



Resource Management Success: Establishing a Resource Management Office (RMO)

Your Guides:
Michelle Merriam-Day & Hayley Surmann

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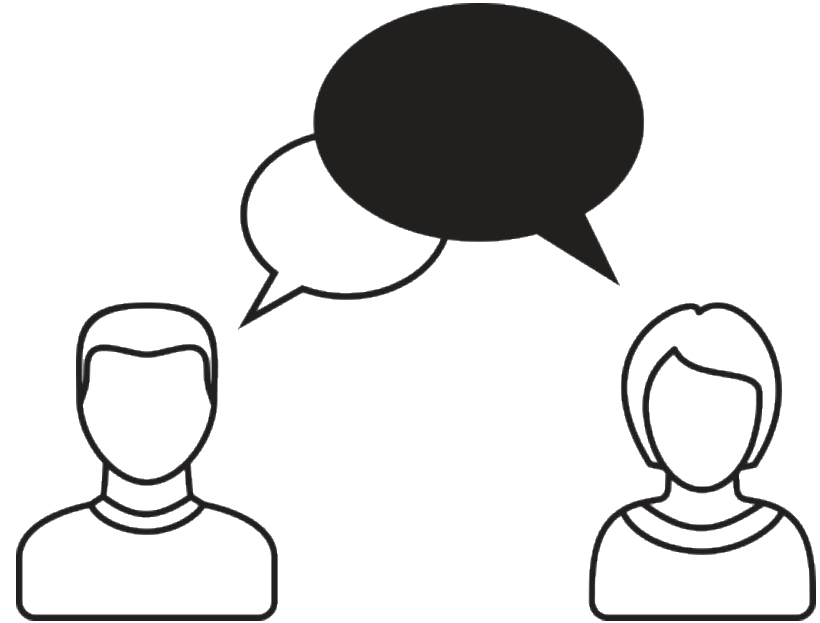
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Introductions

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

“What's one time a staffing issue hurt a project you cared about?”



Agenda

60 minutes, six sections



01

Why this matters

Grounding in a shared pain point



02

The problem, named plainly

What disconnected or absent planning looks like



03

What an RMO is

Decision Owners



04

What good looks like

Charters, operating models, and maturity stages



05

AI in the RMO

Where it helps, and where judgment stays human



06

Make it real

A hands-on activity, and what to do Monday

PART ONE

Why This Matters

It is challenging to make sure the right people are working on the right work at the right time.



Sound Familiar?



Unclear Allocation

We don't know who is working on what, so if I pull people for a new priority item, who and what is impacted?



Unknown Capacity

I keep hearing we don't have enough people to do all the work – is this true? How would I know?



Ad Hoc Forecasting

Resource planning data is out of date the moment it's pulled — spreadsheets across multiple systems, no clear picture.



No Early Warning

I don't have visibility into resource issues ahead of time, only after work and people are impacted.

Exercise: Are these problems in your organization?

Take a moment to discuss — which of these hits closest to home?

1

Visibility Gaps

- No single view of who's working on what
- Capacity & demand data aren't trusted
- Data doesn't exist, or isn't reliable

2

Accountability & Governance

- Unclear who owns resourcing decisions
- Sponsorship isn't visible
- People work around the process

3

Prioritization Under Pressure

- Everything is treated as urgent
- No clear order for what gets staffed
- No defined escalation path

4

Skills & Staffing Constraints

- Scarce skills over-requested everywhere
- Bottleneck roles are unclear
- Staffing relies on tribal knowledge

5

Change & Continuity Risk

- Unclear impact if a key person leaves
- No visibility into future Run-work levels

Discuss: *Which pain creates the most pressure in your organization today?*

Exercise: Pain Point Analysis

Building on the previous pain point, expand the problem statement

1. What information is needed?
2. Is there a process to generate this content? How many teams are involved?
3. Is data centralized, standardized and enterprise? Is it reliable?
4. Is it clear who is supposed to answer the question or take the action?



The Human Side: Reading the Warning Signs

You may already be noticing these patterns on your own team



Overallocation

*Same people always
“on”*

What it puts at risk

Burnout, missed
deadlines, reduced
adaptability



Underallocation

*Capable people
sitting idle*

What it puts at risk

Wasted potential, quiet
disengagement



Demand > Capacity

*More asked of the
team than it can
deliver*

What it puts at risk

Missed deadlines,
corners cut, crisis
staffing, work shuffling

Centralize with an RMO

An RMO 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



Roles & Responsibilities

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



Roadmap

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



Process

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

Why Assign Resource Management Ownership?

Many organizations establish reports, forecasts, dashboards, and processes, but still struggle with accountability, consistency, escalation, prioritization, and follow-through.

Without Clear Ownership

- Resource data exists, but insights are inconsistently acted on
- Staffing conflicts occur, but escalations vary by manager
- Priorities change, but decisions remain reactive
- Forecasts exist, but accountability is unclear

With an RMO

- Ownership and accountability are defined
- Governance and escalation paths are established
- Processes become repeatable
- Reporting supports consistent decisions
- Capability improves over time

Resource-management maturity comes from assigning ownership for decisions, not just from creating reports and processes.

PART TWO

What Good RMOs Actually Do

Payoff and maturity



What a Resource Management Office Actually Does

The RMO is a dedicated function that is responsible for optimizing resource planning. This group owns answering Resource Management questions, such as What are people doing? What are the impacts of change? Do we have upcoming bottlenecks?



Typical Responsibilities

What the RMO owns or informs

- Staffing decisions & tradeoffs
- Demand vs. capacity planning
- Roles & availability visibility
- Escalation & prioritization support



What an RMO Is NOT

Common misconceptions worth clearing up

- Not a scheduling clerk who just says yes
- Not a substitute for people managers
- Not a timesheet or compliance police
- Not a one-time project — it's ongoing

Why It Pays Off — For Everyone in This Room



Leaders

- Real workforce data behind decisions
- Reduced delivery risk
- Confidence in forecasts, not guesses



Managers

- Fewer emergency fire drills
- Clearer priorities when everyone wants your people
- Room to plan instead of react



Admin & Support

- Less chasing information
- More predictable workloads
- Real visibility into who's doing what

Three Stages of RMO Maturity

These describe scope and decision horizon — not a mandatory sequence. Most rooms recognize themselves at Crawl or Walk, and that's fine.

CRAWL

Tactical

Can we consistently staff the work?

HORIZON

0–3 months

RMO ROLE

Coordinator

REPORTING

Descriptive

DECISION SUPPORT

Staffing

WALK

Operational

Can we deliver the portfolio?

HORIZON

3–12 months

RMO ROLE

Governance engine

REPORTING

Analytical

DECISION SUPPORT

Prioritization

RUN

Strategic

Can we deliver the strategy?

HORIZON

12–24 months

RMO ROLE

Strategic advisor

REPORTING

Predictive

DECISION SUPPORT

Workforce & Investment Strategy

PART THREE

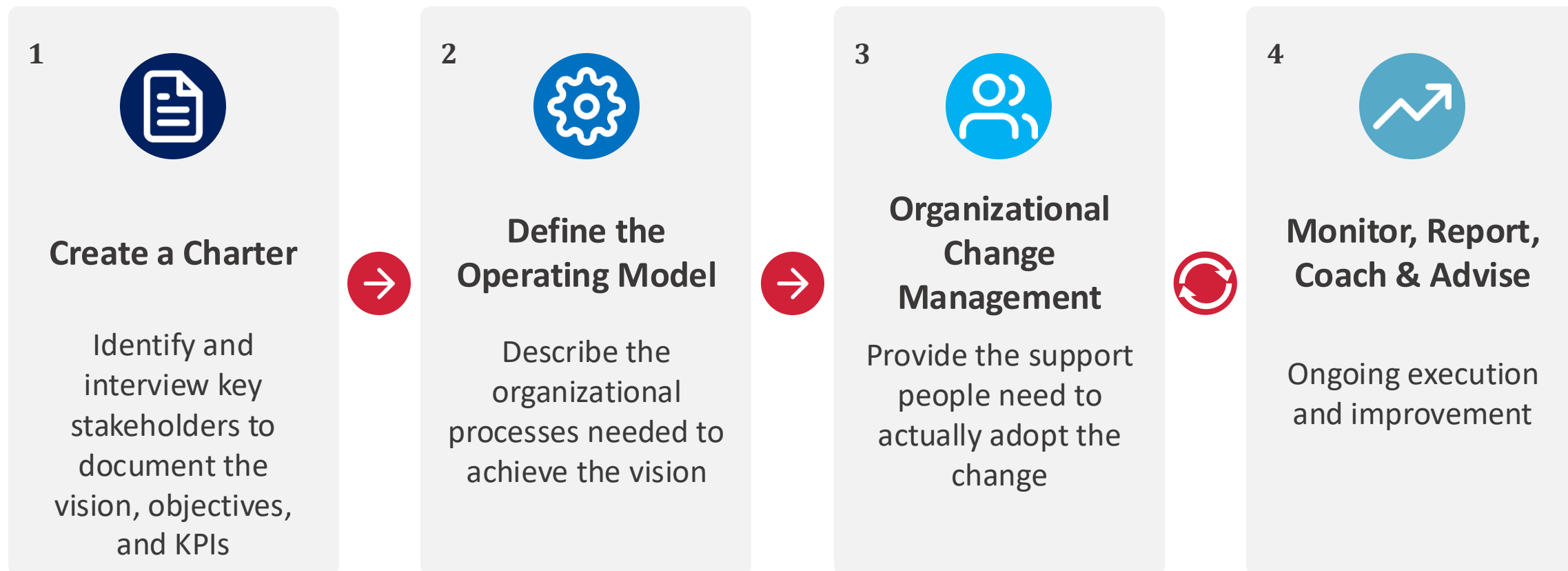
Establishing the RMO

From charter to operating model — and where AI fits in



Establishing the RMO: Four Moves

The same sequence, whether you're standing up a Tactical RMO or a Strategic one



A Charter Is the Why. An Operating Model Is the How.

A charter is approved before the organization builds and runs the operating model



Charter — Why

- Business objectives & outcomes
- Decisions supported
- Stakeholders
- Scope: what's in, what's out
- Measures of success



Operating Model — How

- Roles: who does the work
- Core processes: how work flows
- Governance: how decisions get made
- Outputs: what gets produced
- Tools & data that enable it

The charter establishes intent and authorization. The operating model turns that intent into repeatable action.

Elements of an RMO Charter

The charter defines why the RMO exists and what success looks like



Business Objectives / Expected Outcomes

- Why does the RMO exist?
- What outcomes should improve?



Decisions Supported

- Which decisions should improve?
- What tradeoffs require support?



Stakeholders

- Who participates?
- Who consumes the outputs?



Scope

- What does the RMO own?
- What is explicitly out of scope?



Measures of Success

- How will RMO effectiveness be assessed?
- What adoption, speed, accuracy, or outcome measures matter?



Authority & Governance

- What decision rights exist?
- How are issues escalated and governed?

RMO Operating Model

Once the charter is approved, the operating model defines how the RMO delivers value

Roles

- Who does the work?
- RMO Lead, Resource Managers, Analysts / Planners

Scope

- What does the RMO own?
- Staffing, demand and capacity planning, skills, portfolio optimization

Governance

- How are decisions made?
- Review cadence, escalation paths, prioritization, decision rights

Core Processes

- How does work flow?
- Intake, demand management, allocation, capacity planning, workforce actions

Outputs

- What does the RMO produce?
- Reports, recommendations, escalation packages, workforce plans

Tools & Data

- What enables the model?
- Resource, demand and allocation data, tooling, dashboards

A charter describes the destination. An operating model describes how the organization gets there.

Sample RMO Roles and Responsibilities

Core roles that make the RMO run day to day



RMO Lead

Develop, own, and mature resource management processes, RMO operations and reporting.



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 focuses on analytics and ongoing improvement.

A Sample: Tactical (Crawl) Charter + Operating Model

“Establish Visibility and Stabilize Staffing” — primary question: can we consistently staff the work?

CHARTER

Objectives / Outcomes

Improve workload visibility · improve staffing responsiveness · reduce staffing conflicts · establish foundational RM processes

Decisions Supported

Who should be staffed? What remains unstaffed?
When should conflicts be escalated?

Stakeholders

Resource Managers · Functional Managers ·
Delivery Leaders · Project Managers

OPERATING MODEL

Priority Actions

Standardize staffing processes · establish staffing reviews · define allocation rules · train Resource Managers

Typical Outputs

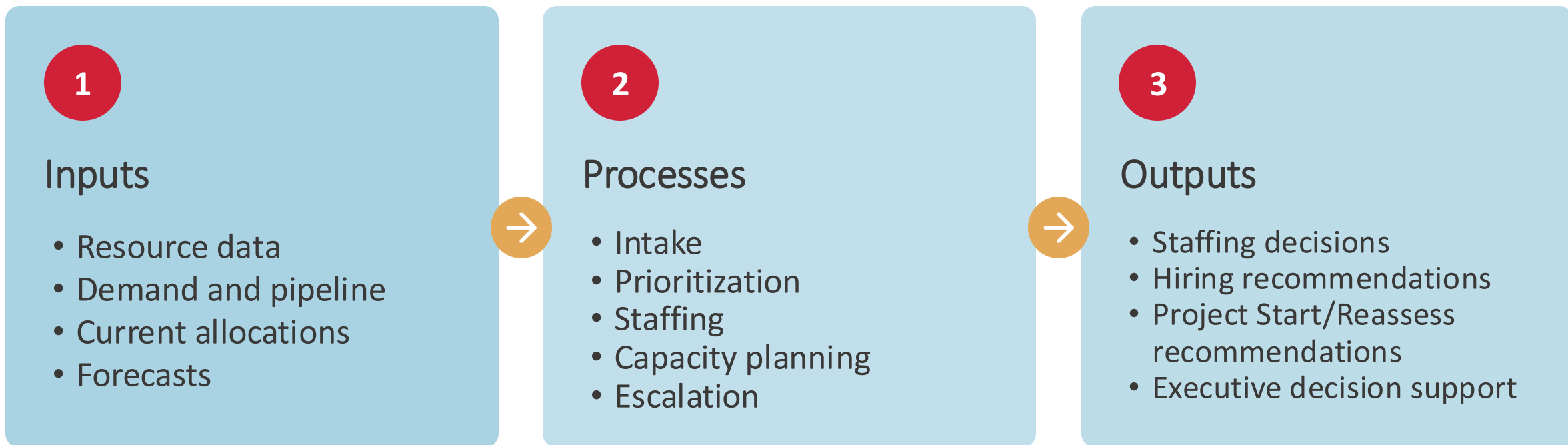
Open demand report · staffing escalation list ·
availability report · weekly review package

Measures of Success

Staffing timeliness improving · process adoption increasing · unstaffed demand declining

Business Processes & Accountability

Define the flow, the decision points, and who is accountable for action



Accountability overlay

Document who provides inputs, who owns each process, who decides, and who receives each output. Create a RACI.

Resource Management: Building Blocks



Resources Track Time on Investments where they are Staffed*

Add Roles / Resources / Teams + Hours to Investments Staff

List Resources & Roles or Teams

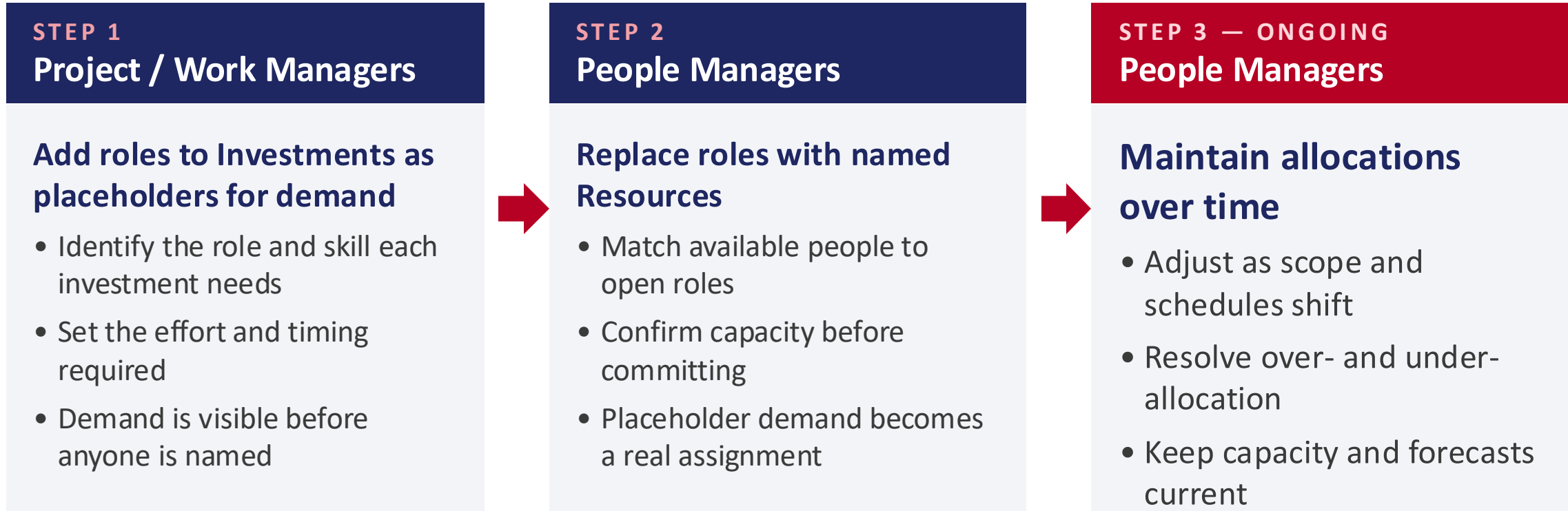
List Projects, Products, Ideas, Value Streams or Other Investments



Review and Plan in Staffing, Roadmaps, Hierarchies, VAIA, Power BI...+

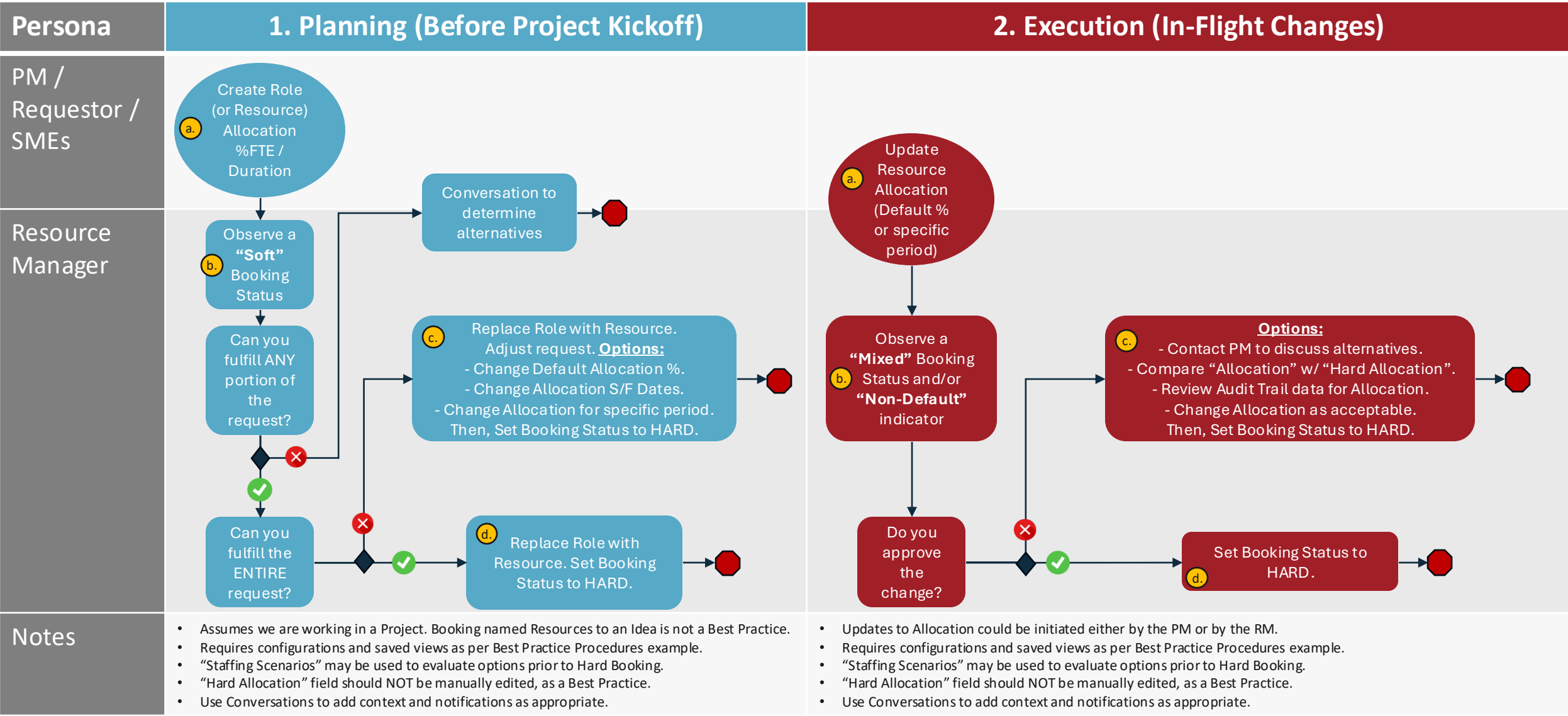
Example: Simple Staffing Process

Define the flow, the decision points, and who is accountable for action



RMO Requirements: Roles capture demand early, named resources confirm supply, and ongoing upkeep keeps the plan trustworthy.

Example: More Complex Staffing Process



Example: Decision Support

Describe the decisions, data needed, and visualization

Decision Needed

Do we have the resource capacity to start one or more new projects?

Data Needed

- Role demand by month on the proposed projects
- Current availability by role and month
- Committed demand by role and month across in-flight work
- Remaining capacity: availability less total demand

Visualization

- Staffing Workspace — live view of demand vs. availability
- Report — capacity vs. demand, shortfalls flagged
- AI — ask the question, get the gaps and options in plain language

Staffing Scenario: -- Select --

Allocations By Investment Allocations By Resource Assignments By Investment Assignments By Resource **Staff** Investments

View: Where is my team working?

Select all Deselect all

Group	Staffing Role	Totals Allocation	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02
			Allocation	Allocation	Allocation	Allocation	Allocation	Allocation
> Childers, Valerie (6)		326.00 / 1,032.00	168.00 / 176.00	88.00 / 176.00	16.00 / 168.00	11.04 / 184.00	11.72 / 168.00	31.24 / 160.00
> Coleman, Joyce (3)		1,787.45 / 1,032.0	100.00 / 176.00	505.75 / 176.00	482.76 / 168.00	698.95 / 184.00	0.00 / 168.00	0.00 / 160.00
> Dixon, Danielle (3)		570.00 / 1,032.00	220.00 / 176.00	180.00 / 176.00	42.00 / 168.00	46.00 / 184.00	42.00 / 168.00	40.00 / 160.00
> Hayes, Justin (5)		1,234.38 / 1,032.0	181.49 / 176.00	181.49 / 176.00	173.24 / 168.00	359.95 / 184.00	173.24 / 168.00	164.99 / 160.00
> McKay, Erin (13)		2,629.60 / 1,032.0	651.20 / 176.00	603.20 / 176.00	402.40 / 168.00	349.60 / 184.00	319.20 / 168.00	304.00 / 160.00
> Morris, Tom (8)		1,952.61 / 1,032.0	299.20 / 176.00	299.20 / 176.00	285.60 / 168.00	501.01 / 184.00	327.60 / 168.00	240.00 / 160.00
> Ramos, Adriana (3)		696.00 / 1,032.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00	176.00 / 184.00	0.00 / 168.00	0.00 / 160.00

Organizational Change Management

Change sticks when people know why it matters, what they must do, and how to do it



01

Why change?

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



02

What do I do?

- Clearly document WHO does WHAT and WHEN



03

How do I do that?

- Training
- Reference

Implementation Best Practices



Start Simple

- Directionally accurate data is enough to decide
- More precision costs more time and effort
- Crawl, walk, run — build it out as needed



Design for Key Outputs

- Keep the end in mind and capture only what drives decisions
- **Require the minimum work necessary to meet business goals**



Make It Actionable

- Define the outputs and who is accountable for them
- OCM and sponsorship carry enterprise adoption
- Persona-specific views simplify the experience

Sample Capability Roadmap

Each capability builds on the last — mapped here to the Crawl / Walk / Run stages from earlier



AI: A Force Multiplier, Not a Replacement



Faster forecasting

Turns scenario planning from an occasional exercise into a routine one



Early risk flags

Surfaces over/under allocation patterns before they escalate



Skills matching at scale

Matches people to demand faster than manual review



Plain-language reporting

Ask a question, get an answer



The guardrail: AI accelerates visibility and pattern detection — it doesn't own governance, tradeoffs, or people decisions. Those stay human.

AI is only as good as the data feeding it.

Get the data and process foundation right first.

AI compounds a good operating model, it doesn't substitute for one.

AI Planning Scenario

Do we have capacity to start Project Xray?



Response

■ Executive Summary

Analysis Date: **2026-09**. Planning Horizon reviewed for start feasibility: **2026-09 through 2026-12**. Based on the RMO standards, **Project Xray does not appear start-feasible as planned** if it begins in the near term. The project carries substantial early demand in already constrained roles, and the named resources most aligned to

■ Recommended Actions

Owner	Action	Details	Tradeoff
Portfolio/ RMO	Replan dates	Delay Project Xray start until Architect and Business Analyst capacity is freed or reassigned from lower-priority work.	Delays planned delivery and any dependent milestones.
RMO	Add capacity (hiring or contract)	Backfill near-term Architect and Business Analyst demand if Project Xray must start on schedule.	Increases cost and may still require onboarding lead time.
RMO	Cross-train or upskill	Use adjacent-role capacity where feasible to reduce pressure on constrained start-critical roles.	Only partial relief; not fast enough for a large immediate start.

- **Bottom line: with the current plan, Project Xray should not be committed for Sep-Dec 2026; Jan 2027 is the earliest plausible phased start, and a full start likely requires reprioritization or added capacity.**

AI Review - Indicators and Actions

■ Executive Summary

Analysis Date: 2026-08-08

Planning Horizon: 2026-08 through 2027-03

This review applied RMO Watch/Act thresholds to remaining availability by named resource and to role-demand placeholders in the allocation plan. The strongest risks are persistent overallocation in several critical delivery roles, broad underallocation across many named resources, and near-term feasibility pressure from unapproved work that already carries substantial role demand.

• Overallocated Resources — Immediate

- **17 named resources** show negative remaining availability in **2026-08**; **13** remain negative for **2+ consecutive months** (Act).
- Affected roles include Manager, Architect, QA, Product Owner, UX, Project Manager, Business Analyst, Engineer, and ML Engineer.
- **Business impact: sustained overload raises delivery slippage and burnout risk on active approved work, especially ABLE Payments, Digital Banking User Experience, and eCommerce Portal v2.0.**

• Underallocated Resources — Immediate

- **53 named resources** have remaining availability above **20%** in every month reviewed; many are at **100%** available.
- Largest visible idle pools are Engineer, QA, Product Manager, Project Manager, and Business Analyst.
- **Business impact: excess bench capacity coexists with overload elsewhere, indicating poor workload balancing and avoidable opportunity cost.**

• Idea / Project Start Feasibility — Upcoming (Month 1-3)

- Unapproved work within the next **3 months** includes heavy placeholder demand for Architect and Business Analyst roles.
- Examples: ABLE Payments 2.0 requires **15.4-16.7 hrs/month** each for Architect and Business Analyst placeholders; Email archival repository requires **9 hrs/month**.
- **Business impact: near-term starts are not credibly staffable without date moves, scope control, or added capacity.**

Example AI Analysis – Indicators and Actions

■ Recommended Actions

Owner	Action	Details	Tradeoff
Resource Manager	Rebalance workloads; Add staff; Replan work	Immediately relieve persistent overload on Managers, Architects, QA, Product Owners, and Engineers supporting ABLE Payments, eCommerce Portal v2.0, and Digital Banking User Experience.	May delay lower-priority work or require contractor cost.
Resource Manager	Rebalance workloads; Replan work; Reassign staff	Move underused Engineers, QA, PMs, and BAs into approved demand first; use cross-project reassignment before opening new requests.	Short-term transition time and onboarding overhead.
Portfolio/RMO	Replan dates; Pivot via Continue/Cancel reviews and reallocation; staff aug	Gate unapproved starts in the next 3 months, especially ABLE Payments 2.0, Email archival repository, and Agentic AI for Now, until named capacity is secured.	Could defer strategic initiatives or reduce planned scope.

Example AI Analysis – Unstaffed Roles

■ Executive Summary

Near-term unstaffed demand was identified from role-based Staff records (**Is Role = true**) with non-zero allocation in the next planning periods. Recommendations below use named resources whose **Primary Role** matches the unstaffed role and who have positive remaining availability. Recommendations were assigned top-to-bottom by ascending project priority, and each recommended resource was used only while sufficient remaining availability still existed.

- Near-term focus period: **2026-08**
- Ordering: **Project Priority ascending**
- Constraint applied: **No recommendation shown if assignment would reduce remaining availability below 0**

■ Near-Term Unstaffed Roles by Project and Role

Prior ity	Project	Role	2026-08 Unstaffed Demand (FTE)	Recommended Resource	Primary Role Match	Available FTE Before Assignment	Recommendation Status
2	Implementing Workday	Business Analyst	2.35	Alex Castro	Business Analyst	1.00	Partial only; full demand cannot be covered by one available BA
2	Implementing Workday	Architect	2.35	Justin Hayes	Architect	0.97	Partial only; full demand cannot be covered
2	Agentic AI for Salesforce	Business Analyst	7.00	Wayne Hill	Business Analyst	0.00	No viable recommendation under availability constraint
2	Agentic AI for Salesforce	Architect	7.00	Todd Hayes	Security Architect	0.94	No exact Primary Role match; not recommended
2	Agentic AI for Now	Business Analyst	7.00	None remaining	Business Analyst	0.00	No viable recommendation after higher-priority assignment

PART THREE

Make It Real

A hands-on activity, and what you can do starting Monday



Activity: Build a Draft Charter

5 minutes — pick one resourcing issue from your own area and draft one line for each card below



Objectives

What outcome are you trying to improve?



Decisions

What decision should get easier or faster?



Stakeholders

Who else needs to be involved?



Scope

What's in — and explicitly out?

Workshop output: a first-draft resourcing charter

Build Your RMO Charter

Use the sample cards to assemble a first draft charter

Sample cards

Objectives Improve staffing timeliness
Improve forecast confidence
Enable workforce planning

Decisions Staffing
Prioritization
Hiring/contracting

Stakeholders Executives
PMO
Functional Leaders
Resource Managers

Measures Process adoption
Data reliability
Strategic alignment

Scope Staffing
Capacity planning
Skills management

Draft Charter

**Business Objectives /
Outcomes**

Drag or rewrite objective cards here

Decisions Supported

Identify decisions the RMO should improve

Stakeholders

Identify participants and affected groups

Scope

Define what is in and out

Measures of Success

Choose measures tied to RMO effectiveness

Workshop output: a first draft RMO Charter ready for stakeholder review.

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Three Takeaways



EVERY SESSION, EVERY TIME

Take a crawl – walk – run approach



SYSTEMS APPROACH

Maturity comes from assigning ownership for decisions, not just reports and processes.



RIGHT-SIZE THE WORK

Require the minimum work necessary to meet business goals.

Questions?



Survey



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- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
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Appendix

Examples and Reference

Appendix A

Sample Charters and Operating Models



Tactical (Crawl) Charter + Operating Model

“Establish Visibility and Stabilize Staffing” — primary question: can we consistently staff the work?

CHARTER

Objectives / Outcomes

Improve workload visibility · improve staffing responsiveness · reduce staffing conflicts · establish foundational RM processes

Decisions Supported

Who should be staffed? What remains unstaffed?
When should conflicts be escalated?

Stakeholders

Resource Managers · Functional Managers ·
Delivery Leaders · Project Managers

OPERATING MODEL

Priority Actions

Standardize request intake · establish staffing reviews · define allocation rules · train Resource Managers

Typical Outputs

Open demand report · staffing escalation list · availability report · weekly review package

Measures of Success

Staffing timeliness improving · process adoption increasing · unstaffed demand declining

Operational (Walk) Charter + Operating Model

“Manage Capacity and Demand Across the Portfolio” — primary question: can we deliver the portfolio?

CHARTER

Objectives / Outcomes

Improve capacity planning · improve prioritization · increase forecast confidence · reduce portfolio bottlenecks

Decisions Supported

What work starts? What work waits? Which roles need augmentation? What workforce actions are required?

Stakeholders

Executives · PMO / Portfolio Leaders · Functional Managers · Resource Managers

OPERATING MODEL

Priority Actions

Formalize governance · implement demand management · establish prioritization · define workforce actions

Typical Outputs

Portfolio capacity report · resource review package · prioritization recommendations · workforce action plan

Measures of Success

Forecast accuracy improving · capacity planning coverage increasing · staffing timeliness improving

Strategic (Run) Charter + Operating Model

“Enterprise Workforce & Portfolio Decision Support” — primary question: can we deliver the strategy?

CHARTER

Objectives / Outcomes

Enable strategic workforce planning · improve strategic alignment · improve investment decision-making · increase confidence in planning data

Decisions Supported

Hire, contract, cross-train, or redeploy? Can strategy be delivered? Which investments should accelerate? What skills become future constraints?

Stakeholders

Executive Leadership · Portfolio Governance · Finance & HR Partners · Business / Functional Leaders

OPERATING MODEL

Priority Actions

Strategic workforce planning · scenario planning · long-range forecasting · continual improvement

Typical Outputs

Workforce plan · executive decision package · strategic alignment report · scenario analysis

Measures of Success

Strategic alignment % increasing · data reliability improving · workforce gap closure rate increasing

Sample RMO Charter: Tactical (Crawl)

Establish Visibility and Stabilize Staffing

PRIMARY QUESTION

Can we consistently staff the work?

A foundational RMO focused on workload visibility, staffing responsiveness, conflict reduction, and repeatable practices.

Business Objectives / Outcomes

- Improve workload visibility
- Improve staffing responsiveness
- Reduce staffing conflicts
- Establish foundational RM processes

Decisions Supported

- Who should be staffed?
- What work remains unstaffed?
- When should conflicts be escalated?

Stakeholders

- Resource Managers
- Functional Managers
- Delivery Leaders
- Project Managers

Measures of Success

Measure	Desired Direction
Staffing Timeliness	Improving
Process Adoption	Increasing
Unstaffed Demand Trend	Declining
Forecast Data Completeness	Increasing
Stakeholder Satisfaction	Improving

Sample RMO Operating Model: Tactical (Crawl)

How the RMO operates to establish visibility and stabilize staffing

Priority Actions	Business Processes	Typical Outputs	RMO Focus
• Standardize request intake • Establish staffing reviews • Define allocation rules • Train Resource Managers	• Request intake • Staffing coordination • Workload balancing • Escalation management	• Open demand report • Staffing escalation list • Availability report • Weekly review package	• Visibility • Adoption • Staffing governance • Data discipline

Actionable Indicators

Indicator	Formula / Measurement	Impact	Lever
Overallocated Resources	$\text{Remaining Availability \%} = (\text{Availability} - \text{Allocation}) / \text{Availability}$	Delivery risk, burnout, reduced adaptability	Rebalance; add staff; replan
Underallocated Resources	$\text{Remaining Availability \%} = (\text{Availability} - \text{Allocation}) / \text{Availability}$	Opportunity cost	Rebalance; replan; reassign
Current Unstaffed Demand	Current-period Allocation where Staff Type = Role	Immediate work lacks identified staffing	Assign; reprioritize; escalate
Near-Term Unstaffed Demand	Near-term Allocation where Staff Type = Role	Upcoming work may not be ready to start	Match earlier; adjust timing; add capacity
Forecast vs. Actual Variance	$(\text{Actuals} - \text{Allocation}) / \text{Allocation}$	Poor planning quality; reactive staffing	Improve estimates; replan; add buffer

Formula descriptions are simplified for presentation. Detailed calculations and thresholds remain in the RMO Evaluation Notes.

Sample RMO Charter: Operational (Walk)

Manage Capacity and Demand Across the Portfolio

PRIMARY QUESTION

Can we deliver the portfolio?

A portfolio-level RMO focused on capacity planning, prioritization, forecast quality, and coordinated workforce action.

Business Objectives / Outcomes

- Improve capacity planning
- Improve prioritization
- Increase forecast confidence
- Reduce portfolio bottlenecks

Decisions Supported

- What work starts?
- What work waits?
- Which roles need augmentation?
- What workforce actions are required?

Stakeholders

- Executives
- PMO / Portfolio Leaders
- Functional Managers
- Resource Managers

Measures of Success

Measure	Desired Direction
Forecast Accuracy	Improving
Capacity Planning Coverage	Increasing
Staffing Timeliness	Improving
Escalation Resolution Time	Declining
Process Adoption	Increasing

Illustrative Measures of Success should be tailored to the charter's objectives and tied to owned outcomes.

Sample RMO Operating Model: Operational (Walk)

How the RMO manages portfolio capacity, demand, prioritization, and workforce actions

Priority Actions	Business Processes	Typical Outputs	RMO Focus
• Formalize governance • Implement demand management • Establish prioritization • Define workforce actions	• Demand management • Capacity planning • Portfolio reviews • Workforce actions	• Portfolio capacity report • Resource review package • Prioritization recommendations • Workforce action plan	• Governance • Planning • Prioritization • Data integrity

Actionable Indicators

Indicator	Formula / Measurement	Impact	Lever
Role Demand vs. Capacity	Allocation by Staff Role vs. Availability by Primary Role	Shortage or surplus risk	Replan; hire/contract; redeploy; cross-train
Forecast vs. Actual Variance	$(\text{Actuals} - \text{Allocation}) / \text{Allocation}$	Poor forecast accuracy; reactive staffing	Improve estimates; replan; add buffer
Cross-Project Contention	Distinct investments per resource per period	Context switching; hidden overallocation	Reduce fragmentation; adjust assignments
Current & Near-Term Unstaffed Demand	Allocation where Staff Type = Role by planning period	Work may lack identified staffing	Prioritize matching; adjust timing; add capacity

Role Demand vs. Capacity combines shortage and surplus signals into one indicator interpreted by direction and magnitude.

Sample RMO Charter: Strategic (Run)

Enterprise Workforce & Portfolio Decision Support

PRIMARY QUESTION

Can we deliver the strategy?

A strategic RMO focused on workforce planning, investment alignment, portfolio optimization, and executive decision

Business Objectives / Outcomes

- Enable strategic workforce planning
- Improve strategic alignment
- Improve investment decision-making
- Increase confidence in planning data

Decisions Supported

- Hire, contract, cross-train, or redeploy?
- Can strategy be delivered?
- Which investments should accelerate?
- What skills become future constraints?

Stakeholders

- Executive Leadership
- Portfolio Governance
- Finance and HR Partners
- Business / Functional Leaders

Measures of Success

Measure	Desired Direction
Strategic Alignment %	Increasing
Data Reliability	Improving
Workforce Gap Closure Rate	Increasing
Executive Satisfaction	Improving
Portfolio Delivery Success	Improving

Illustrative measures should be tailored to the charter's objectives and tied to owned outcomes.

Sample RMO Operating Model: Strategic (Run)

How the RMO supports long-range workforce and investment decisions

Priority Actions	Business Processes	Typical Outputs	RMO Focus
• Strategic workforce planning • Scenario planning • Long-range forecasting • Continual improvement	• Workforce planning • Strategic alignment • Scenario analysis • Portfolio optimization	• Workforce plan • Executive decision package • Strategic alignment report • Scenario analysis	• Strategy • Analytics • Decision support • Continuous improvement

Actionable Indicators

Indicator	Formula / Measurement	Impact	Lever
Role Demand vs. Capacity	Forecast Allocation by Staff Role vs. Availability by Primary Role	Long-range shortage or surplus risk	Build, buy, borrow, redeploy
Data Reliability	Trusted and complete planning data across agreed domains	Low confidence in executive decisions	Improve ownership, validation, and audits
Strategic Alignment %	Capacity aligned to strategic priorities / total capacity	Resources drift from priorities	Reprioritize investments and staffing
Cross-Project Contention	Distinct investments per resource per period	Systemic bottlenecks; fragmentation	Reduce contention; redesign staffing
Workforce Gap Analysis	Future demand minus forecast capacity by skill / role	Unaddressed future capability gaps	Hire, contract, cross-train, redeploy

Strategic indicators should be paired with scenario analysis and reviewed through executive governance.

Appendix B

Indicators

Staffing Risk Indicators

The plain-language version of the signals behind the maturity-model indicators shown earlier

SIGNAL	WHAT IT MEANS	BUSINESS LEVER
Overallocated Resources	Someone's workload consistently exceeds their available time	Rebalance workloads; add staff; replan work
Underallocated Resources	Capable people are sitting well below available capacity	Rebalance workloads; replan; reassign staff
Role Demand Exceeds Capacity	A whole role or skill type is oversubscribed across projects	Replan work; add capacity via hiring or contracting; cross-train
Role Demand Below Capacity	A role or skill type has more available capacity than planned work	Redeploy; adjust future hiring plans; take on more work
Forecast vs. Actual Variance	What was planned and what actually happened keep drifting apart	Improve estimates; replan more often; build in buffer

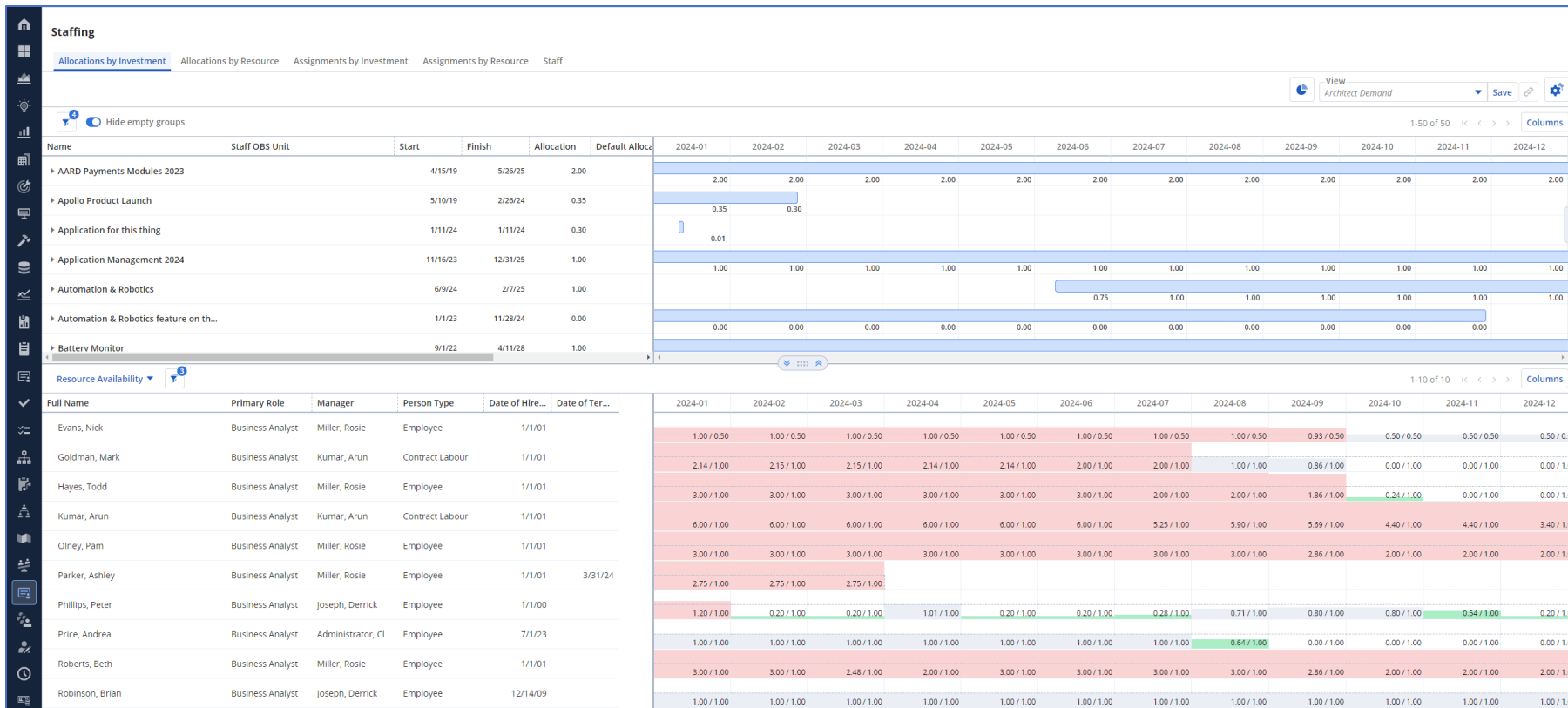
Appendix C

Clarity Staffing and Reports



Staffing – Clarity Workspace

Use the Staffing Workspace to staff projects and for ad hoc analysis

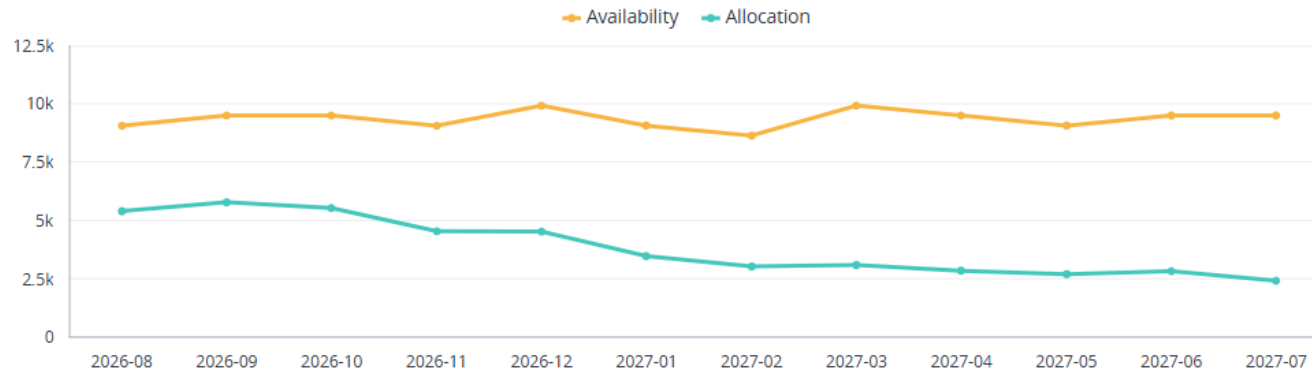


Good Places to Start:

- Staffing Workspace

Reporting – Clarity Reports

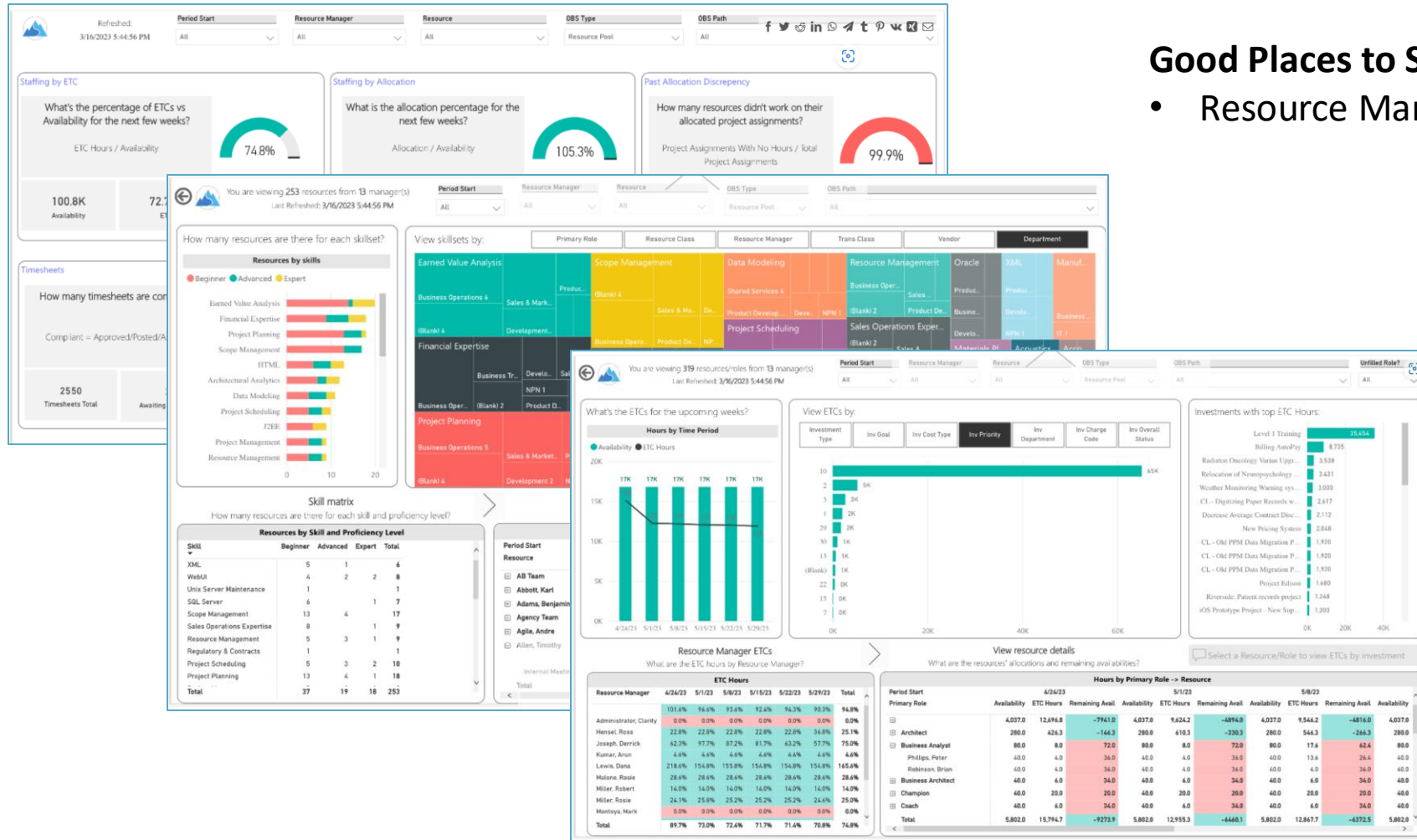
Capacity vs. Allocation by Month



Over/Under Allocation by Resource Manager

Manager / Resource	Totals	2026-08	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02	2027-03	2027-04	2027-05	2027-06	2027-07
Total	66,259	3,680	3,731	3,975	4,534	5,412	5,611	5,624	6,858	6,668	6,384	6,688	7,095
Miller, Rosie	66,259	3,680	3,731	3,975	4,534	5,412	5,611	5,624	6,858	6,668	6,384	6,688	7,095
Andersson, Peter	2,080	168	176	176	168	184	168	160	184	176	168	176	176
Awad, Rashid	952	0	0	0	0	0	0	72	184	176	168	176	176
Baker, Isaac	352	(168)	(176)	(176)	(168)	(168)	168	160	184	176	168	176	176
Bauer, Joyce	580	42	44	44	42	46	42	40	46	44	42	44	104
Chen, Chih-wei	2,080	168	176	176	168	184	168	160	184	176	168	176	176
Clarke, Stanley	0	0	0	0	0	0	0	0	0	0	0	0	0
Cohen, Rita	(1,064)	(168)	(176)	(176)	(168)	(184)	(168)	(24)	0	0	0	0	0
Computer	0	0	0	0	0	0	0	0	0	0	0	0	0
Dixon, Danielle	1,100	(42)	(44)	(4)	126	138	126	120	138	132	126	132	152
Donegal, Amy	2,080	168	176	176	168	184	168	160	184	176	168	176	176
...	...	...	...	...	...	...	...	...	...	...	...	...	...

Reporting – PowerBI



Good Places to Start:

- Resource Management Summary Dashboard