



Solving Resource Allocation & Visibility, RM Best Practices

NOTE:

If you attended Monday's hands-on RM workshop, much of this material will be repetitive

Your Guides:

Matthew Palicki & Ross Hensel

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Introduction – Learning Objectives *(Slido Poll)*

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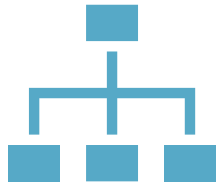
Which best matches your main reason for attending?

1. Understand the fundamental Clarity capabilities and features for Resource Capacity & Allocations planning
2. Beyond tool capabilities, understand Best Practices for implementing Resource Management and gaining adoption
3. See examples of Best Practices for RM Process flows and procedures, and understand common pitfalls
4. Something else



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Agenda / Learning Objectives



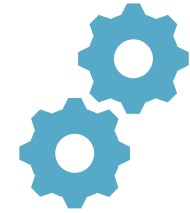
Fundamental Clarity Concepts and “Building Blocks”

Attendees will understand the “Why” and “What” behind Resource Management in Clarity and key operational definitions



Typical implementation considerations and maturity path

Attendees will grasp critical configuration decisions which can impact your adoption and what “good” looks like in Resource Management



Best Practices for RM Process & Data Governance

Attendees will learn examples of efficient RM processes and tool configuration options to help optimize the end user experience

Resource Management & Capacity Planning: WHY?

Broadly speaking, Resource Management and Capacity Planning is about optimizing your organization's resources for near-term operations and long-term planning.

Done effectively, Resource Management and Capacity Planning helps organizations:

- Align resources and strategic priorities
- Smooth workloads and reduce instances of overworked/underutilized staff
- Mitigate project risks
- Make data-driven portfolio decisions
- Increased ability to make and deliver realistic commitments
- Respond efficiently and confidently to change
- Ensure the right people, with the right skills, are working on the right things at the right time

Which Clarity Functions Are (typically) Impacted?

Functionality	RM-Related Capability
Resources	Understand Who/What Resources exists, key information about those resources, and how much time they are available
Investment Staff (& Assignments)	Who (or what Resource qualities) are planned on each Investment and for how much time?
Timesheets	How much time <i>was</i> spent on different Investments?
Staffing Workspace	Analyze data above to view workloads, staffed and unstaffed demand, and create what-if scenarios
Roadmap	Plan investments with an understanding of capacity to deliver
Hierarchies	Analyze staffing on Portfolios, Business Units, or other 'slices' of investment data
Financials	Leverage staffing data to estimate costs
Plans	Plan headcount for upcoming periods

Operational Definitions* – The “What” (For Reference)

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Term	Definition
Capacity	The total theoretical supply of time based on a resource’s profile and work calendar (e.g., 8 hours/day, 40 hours/week), minus company holidays and weekends. This is often interchanged with “Availability”.
Demand / Booking	The total requested need for labor across the portfolio or a defined subset of the portfolio. This includes both "Soft" (proposed)* and "Hard" (confirmed)* requests from Projects and Ideas.
Allocation	A high-level commitment or "reservation" of a resource to an investment (Project/Idea) for a specific period, expressed either as a percentage or total hours (e.g., “50% FTE for Q3” or “80 hrs. / month for six months”).
Remaining Availability	The remaining supply of time a resource has left for new work. It is typically calculated as Capacity minus (Hard*) Allocations.
Assignment	The granular execution level where a resource is linked to a specific WBS task. This defines exactly what the person should be working on within their allocated time.
ETC	(Estimate to Complete) The remaining effort (in hours) required to finish a specific Assignment. It represents future work yet to be performed. Often aggregated to be articulated at the Project level.

*These concepts will be discussed at greater length in subsequent sections.

Operational Definitions* – The “What” (For Reference)

7

Term	Definition
Actuals	The verified effort already expended. In your environment, these are the hours captured in Workday and interfaced back into Clarity to reflect completed work.
Total Usage	A calculation reflecting the Actuals + ETC, to be compared against the original Allocation.
Resource	A named person with a record in Clarity PPM.
Role	A placeholder for demand to later be fulfilled by a Resource, reflecting the type of activity the Resource will perform on the Project (e.g. Architect, Developer, Manager, Scrum Master, Business Analyst, QA, Security Architect). These are typically NOT synonymous with Job Titles.
Skill	Typically a “tag”, identifying one or more specific areas of technical knowledge, experience, or subject matter expertise, used to help identify a “best fit” resource to fulfill specific demand (e.g. “Agentic AI/Machine Learning”, “LSS Black Belt”, “Robot Process Automation (RPA)”, “Python”, “Cybersecurity and Threat Analysis”, “UX Design”)
Staff	Synonymous with the Project Team, this refers specifically to the module/tab within a Project or Idea where you account for Role, Resource, or Team Allocations
Team	A specific module and investment object in Clarity which can be used as a “container” for multiple roles/resources, allowing the Team to be allocated regardless of which resource will actually perform the work. A Resource can have their capacity distributed across multiple Teams, while still allowed to be allocated as an individual resource.

*These concepts will be discussed at greater length in subsequent sections.

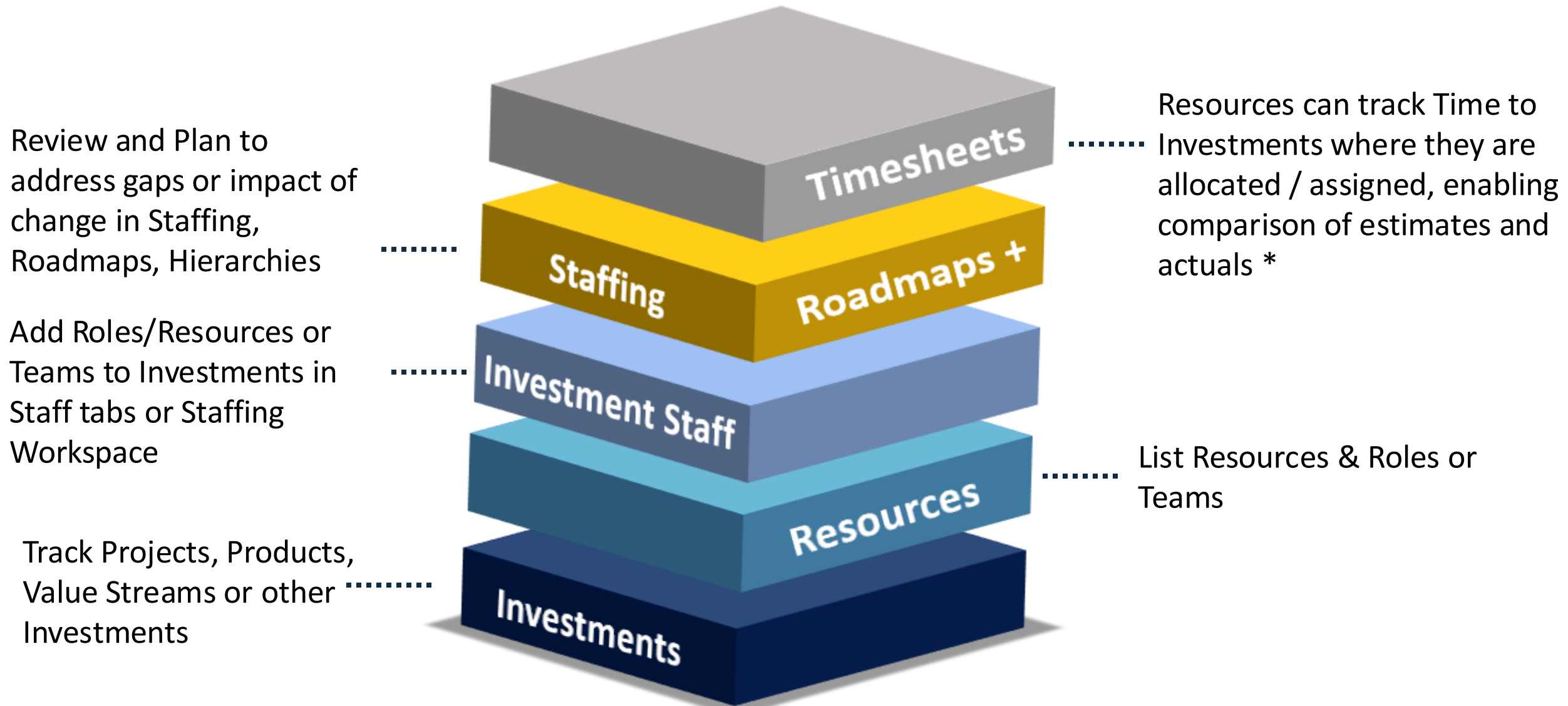
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Building Blocks

Resource Management Building Blocks

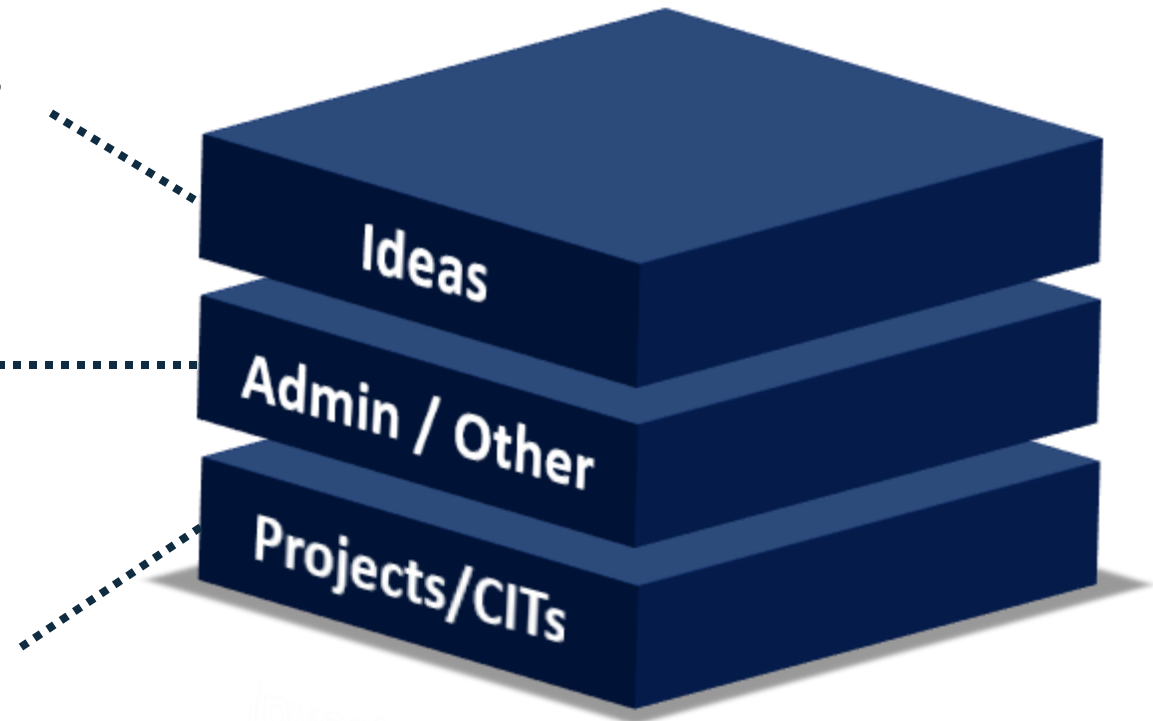


RM Building Blocks: Investments

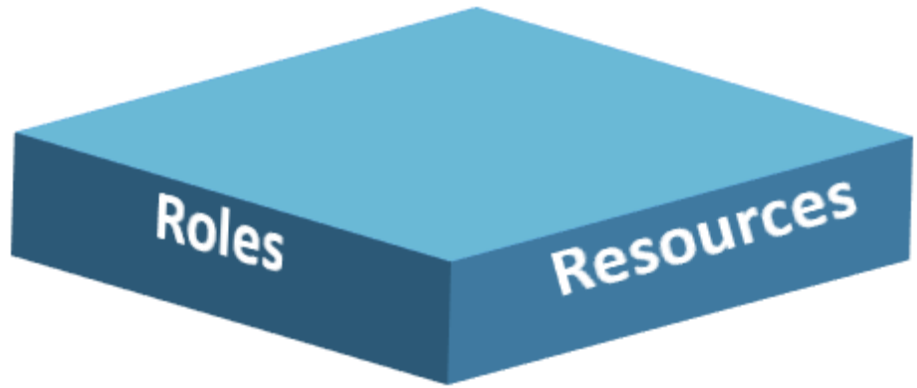
Planning staff on Ideas extends the planning horizon

Additional types of work can be added. Document a full picture of resources' workloads

Typically, an implementation may start with a list of in-flight work



RM Building Blocks: Resources



Roles represent high-level planning functions. Roles can be added to Investment staff as placeholders during planning, and Resources have a Primary Role to enable comparison.

Capture additional data about Resources for planning and analysis.

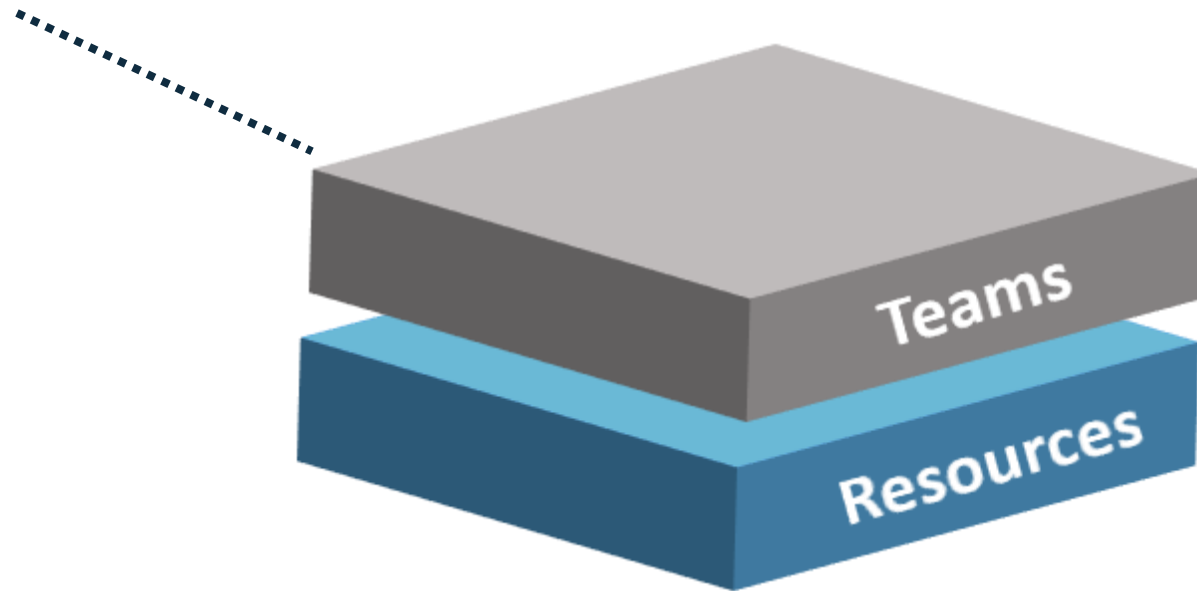
A typical Resource Profile includes:

- Primary Role
- Availability
- Resource pool OBS

Holidays in the Resource Calendar are automatically deducted from Availability

RM Building Blocks: Teams

Optionally, Resources can be added to Team investments, and the Team is added to Investments



RM Building Blocks: Investment Staff

Investment Staff

Investment Staff is where Roles / Resources are added to an Investment.

Planned hours on the Project are added as Allocations.

Staff planning can be further described by Assigning Resources to Tasks and estimating the time per Resource and Task as ETCs.

Projects

AI-Powered Customer Support Automation C

PR2145

On Track

Properties

Tasks

Baselines

Financials

Staff

Assignments

Risks

Issues

Changes

Checklists

Status

Action Items

Workflow

Documents

Conversations

Audit

⌵

Add Staff

<

Per-Period Metrics - 9 Periods

>

1

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▼

View

(Copy) Default View

▼

Unfilled Roles

Allocation Hou...

8

6.06K

Select all

Deselect all

🗲

Group By

Staffing					Staffing	Totals	2025-04	2025-05	2025-06	2025-07
Resource * 2↑	Role 1↑	Start	Finish	Default Allocati...	Allocation	Allocation	Allocation	Allocation	Allocation	
☐ Architect	Architect	Apr 22, 2025	Jul 11, 2025	50%	233	25	88		84	
☐ Architect	Architect	Jun 6, 2025	Dec 31, 2025	25%	298	0	0		34	
☒ Arpel, Ian	Business Analyst	Apr 22, 2025	Dec 31, 2025	75%	1,088	38	132		126	
☐ Engineer	Engineer	Apr 22, 2025	Dec 31, 2025	50%	725	25	88		84	
☐ ML Engineer	ML Engineer	Apr 22, 2025	Dec 31, 2025	80%	1,160	40	141		134	
☐ Product Owner	Product Owner	Jun 3, 2025	Dec 31, 2025	50%	608	0	0		80	
☐ Project Manager	Project Manager	Apr 22, 2025	Dec 31, 2025	50%	725	25	88		84	
☐ QA	QA	Aug 6, 2025	Dec 31, 2025	50%	424	0	0		0	
☐ Security Architect	Security Architect	Apr 22, 2025	Dec 31, 2025	25%	363	13	44		42	
☐ Merriam-Day, Michelle	Data Analytics Engineer	Apr 24, 2025	Dec 31, 2025	30%	432	12	53		50	

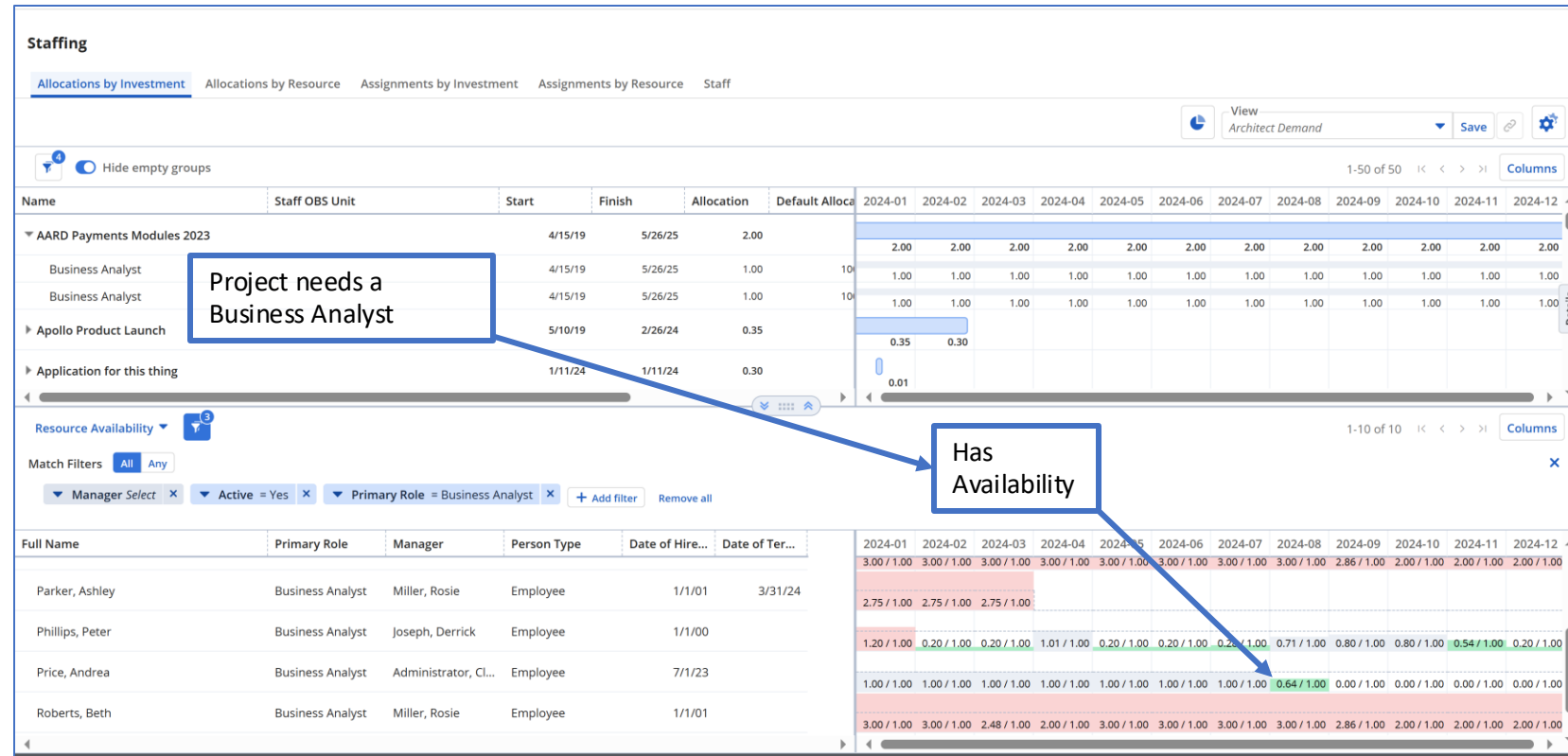
RM Building Blocks: Staffing Workspace

Staffing Workspace

The Staffing page shows Investment Staff information across all Investments and Resources.

The Staffing page supports *many* processes, such as:

1. Staffing Unfilled Roles
2. Reviewing Workloads
3. Assessing the impact of Change
4. Ad hoc Research

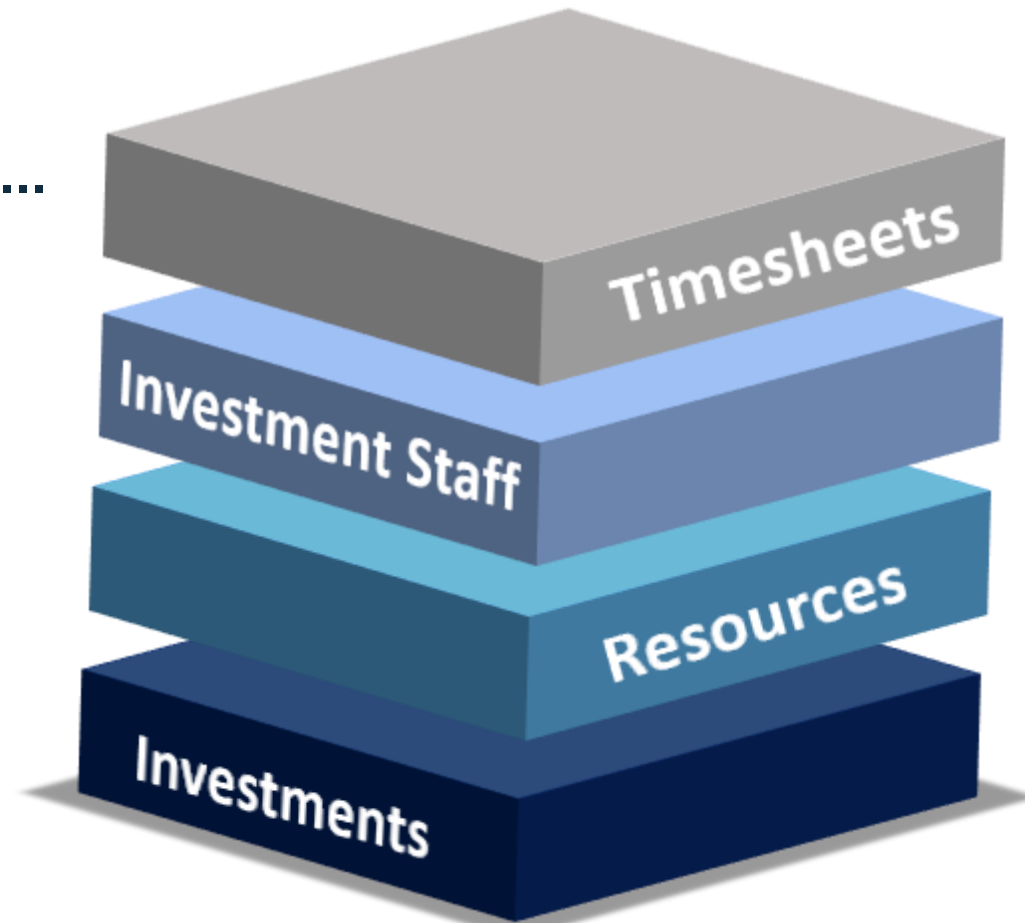


Investment, Resource, and Staff building blocks are required to get value from the Staffing Workspace. Timesheets are not strictly required.

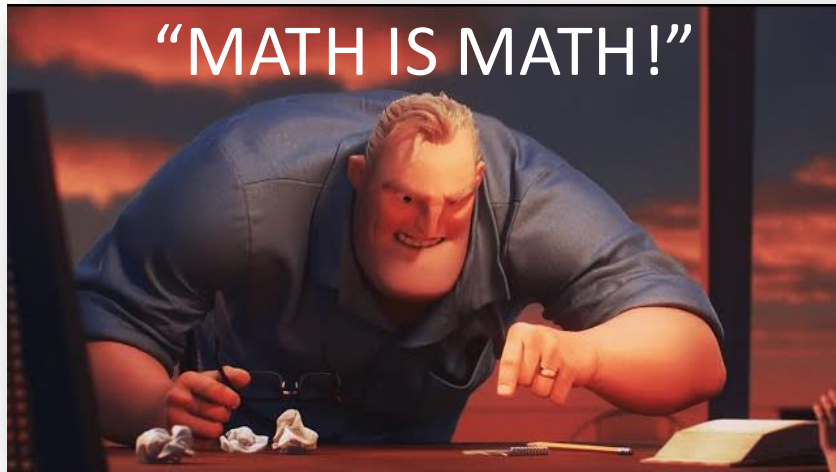
RM Building Blocks: Timesheets

Timesheets record actual hours spent on Investments.

Investment, Resource, and Staff building blocks are required to implement Timesheets.



What Happens if a “Block” is Missing?



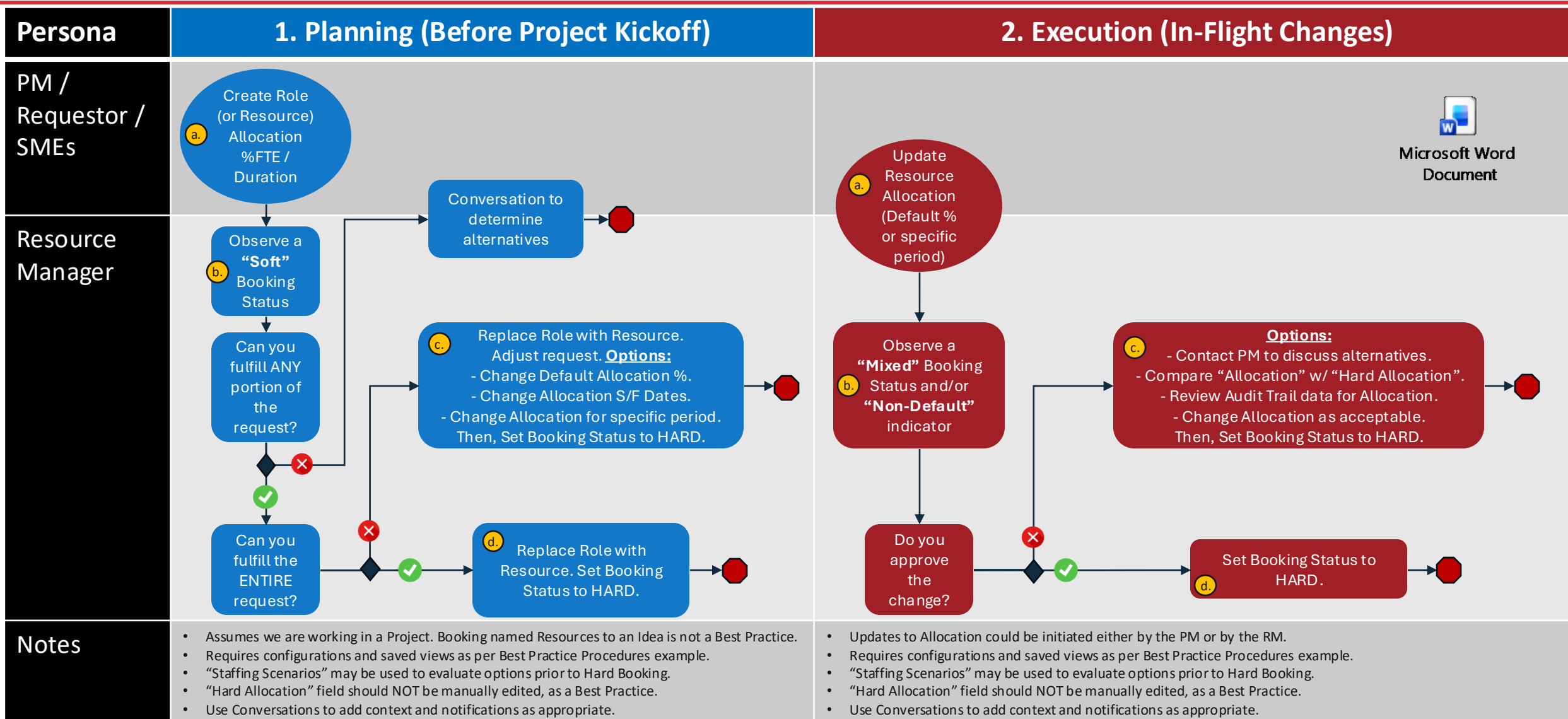
- RM Data is essentially a series of equations
- If one variable is missing from one of the equations, the math won't “Math”
- Some organizations unintentionally inhibit their data analysis by skipping part of the equation

- Capacity = Availability Rate * (TSV – Calendar non-working days)
 - RISK: Don't account for planned non-worked time and you will overstate Capacity
- (Remaining) Availability = Capacity – Allocations
 - RISK: Don't include ALL allocations (e.g. Admin time, Ideas/Unapproved demand) and you lessen the ability to anticipate Over/Under allocations
- Total Usage = Actuals + ETC
 - RISK: Don't track Actuals/Assignments and you can't compare estimated versus actual effort/duration
- Remaining Allocation = Allocation – Total Usage
 - RISK: Don't monitor this value and you can't see if people are being utilized according to their allocation

Clarity Setup Best Practices



Resource Planning and Booking Processes



Resource Profile

- Consider Automation for Resource Data
- Resources should have a meaningful, *high-level* Primary Role, Employment Type, and Resource OBS
 - Remember – these are ways to group information. Keep those elements to a manageable set of values / complexity
- Maintain Date of Hire and Date of Termination
- For contractors, consider maintenance of a Contract End Date
- Remember – managing resources does not consume a license per resource

Resource ▶

Merriam-Day, Michelle MMD

Properties Investments

▼ Collapse all

▼ Summary

Last Name	First Name	Email Address ⓘ	Person Type	Resource ID *
Merriam-Day	Michelle	michelle.merriamday@regoconsulting.com	Employee ▼	MMD

▼ Resource Management

Manager	Department OBS	Primary Role
Arpel, Ian ▼	Corporate:IT ▼	Architect ▼

Resource Pool	Availability Rate ⓘ	Date of Hire ⓘ	Date of Termination ⓘ
People/Engineering ▼	8.00	Aug 16, 2017 📅	📅

Availability Best Practices

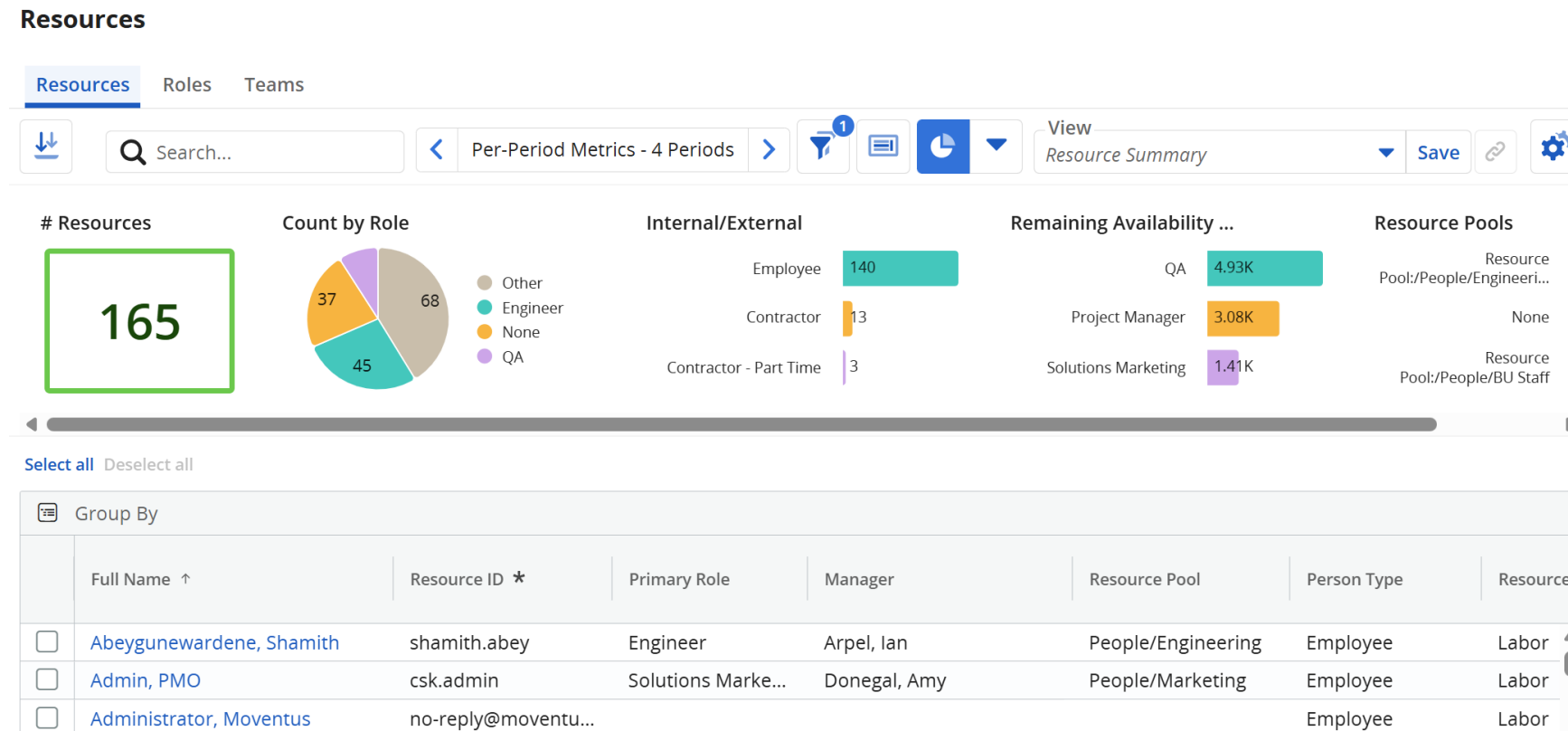
- Avoid high degrees of precision
 - We need the minimal amount of information to make an informed decisions
- Add corporate holidays to the base calendar
 - In multi-national organizations, it is best to use multiple calendars to represent various holidays and work times (8hr day vs. 7hr day)
- Date of Hire and Date of Termination bound the total availability over time

Group By						
	Full Name ↑	Person Type	Date of Termination 🛡	2025-09	2025-10	2025-11
				Availability	Availability	Availability
☐	Awad, Rashid	Employee		176	184	160
☐	Baj	Employee	Sep 30, 2025	176	0	0
☐	Baker, Isaac	Employee		176	184	160
☐	Barry, Debra	Employee		176	184	160
☐	Bauer, Joyce	Employee		176	184	160
☐	Beasley, Frank	Contractor - Par...		88	92	80

Resource Profile - Outputs

Set up your Resource List views to show key decision support outputs such as:

- 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?



Investment Staff: Allocation Best Practices

- Manage allocations by the month
- Adjust expectations of accuracy and granularity according to the time horizon
- Use color-coding or filters to highlight exceptions
- Ensure users are aware of the Unit of Measure
- Need help with estimation? Users making allocation updates can compare Allocation and prior two months of Actuals to inform estimation

Resource ▶

Abeygunewardene, Shamith shamith.abey

Details Investments


 Per-Period Metrics - 12 Periods 




View (Copy) St

Select all Deselect all

Group By					
Investment		2025-01	2025-02	2025-03	
Name	Finish	Allocation	Allocation	Allocation	
☐ Digital Team	Dec 31, 2025	92	80	84	
☐ Business Digital Team	Dec 31, 2027	92	80	84	

Investment Staff: 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 update allocations from 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 piling 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

Investment Staff Outputs

Set up Staffing views to show key decision support outputs such as:

- When are people or groups available for work or overallocated?
- Who is Over or Under-Allocated?
- What percentage of time is planned for each investment type?
- Does Planned work align with our Strategy?

Staffing Scenario: -- Select --

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

View (Copy) Staffing

Select all Deselect all Resource Summary Mo

Group	Idea	Resource	Totals	2025-09	2025-10	2025-11	2025-12
	Department OBS	Primary Role	Allocation	Allocation	Allocation	Allocation	Allocation
▼ Childers, Valerie (4)			2,096 / 704	528 / 176	552 / 184	480 / 160	536 / 184
> Idea (2)			688 / 704	176 / 176	184 / 184	160 / 160	168 / 184
▼ Project (2)			1,408 / 704	352 / 176	368 / 184	320 / 160	368 / 184
☐		Architect	704	176	184	160	184
☐		Architect	704	176	184	160	184
> Coleman, Joyce (1)			0 / 704	0 / 176	0 / 184	0 / 160	0 / 184
> Dixon, Danielle (1)			704 / 704	176 / 176	184 / 184	160 / 160	184 / 184

Staffing Process Support: Staffing Unfilled Allocations

clarity Staffing

Allocations Timeline Staff Grid

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	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

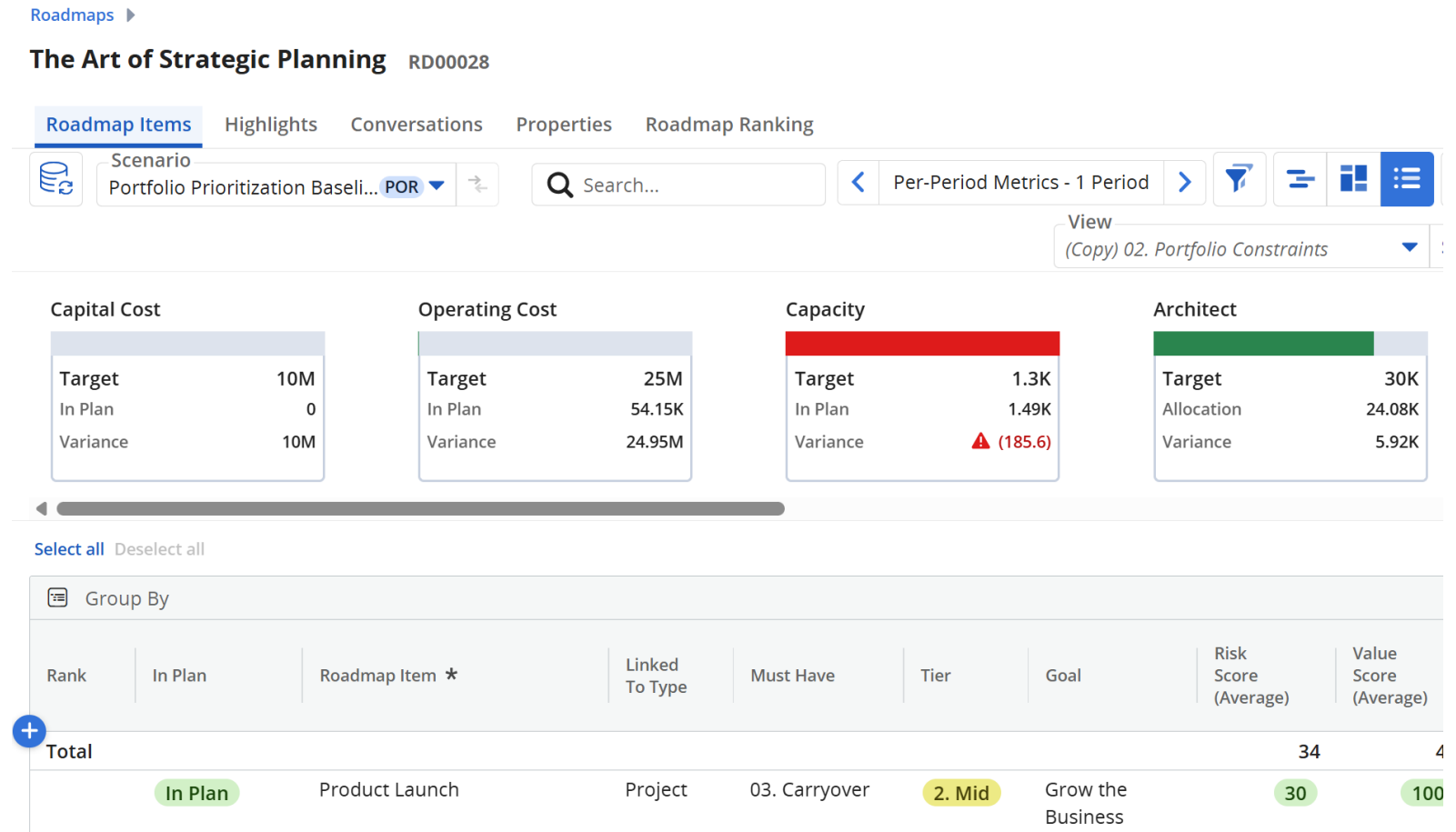
Full Name	Primary Role	Manager	Person Type	Date of Hire	Date o	2023-07	2023-10	2023-11	2023-12
Goldman, Mark	Business Analyst	Kumar, Arun	Contractor	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00
Hayes, Todd	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00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

Looks like Arun has availability

Investment Staff Outputs: Roadmap Planning

Add Pipeline and In-flight work to Roadmaps and align with Target Capacity

- OTB Roadmaps include an overall Capacity Target widget
- Roles in the MUX Roadmap functionality available on Rego Xchange



Additional Capabilities: Plans

Leverage Resource and Investment Staff data for high-level Headcount Planning

[Plans](#) ▶

📌 2025 FTE Capacity 00000057



Published 2024-02-29 08:23:38 ▼

 Recall

 Sync Resource

Plan

Resources

Totals

▶ 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

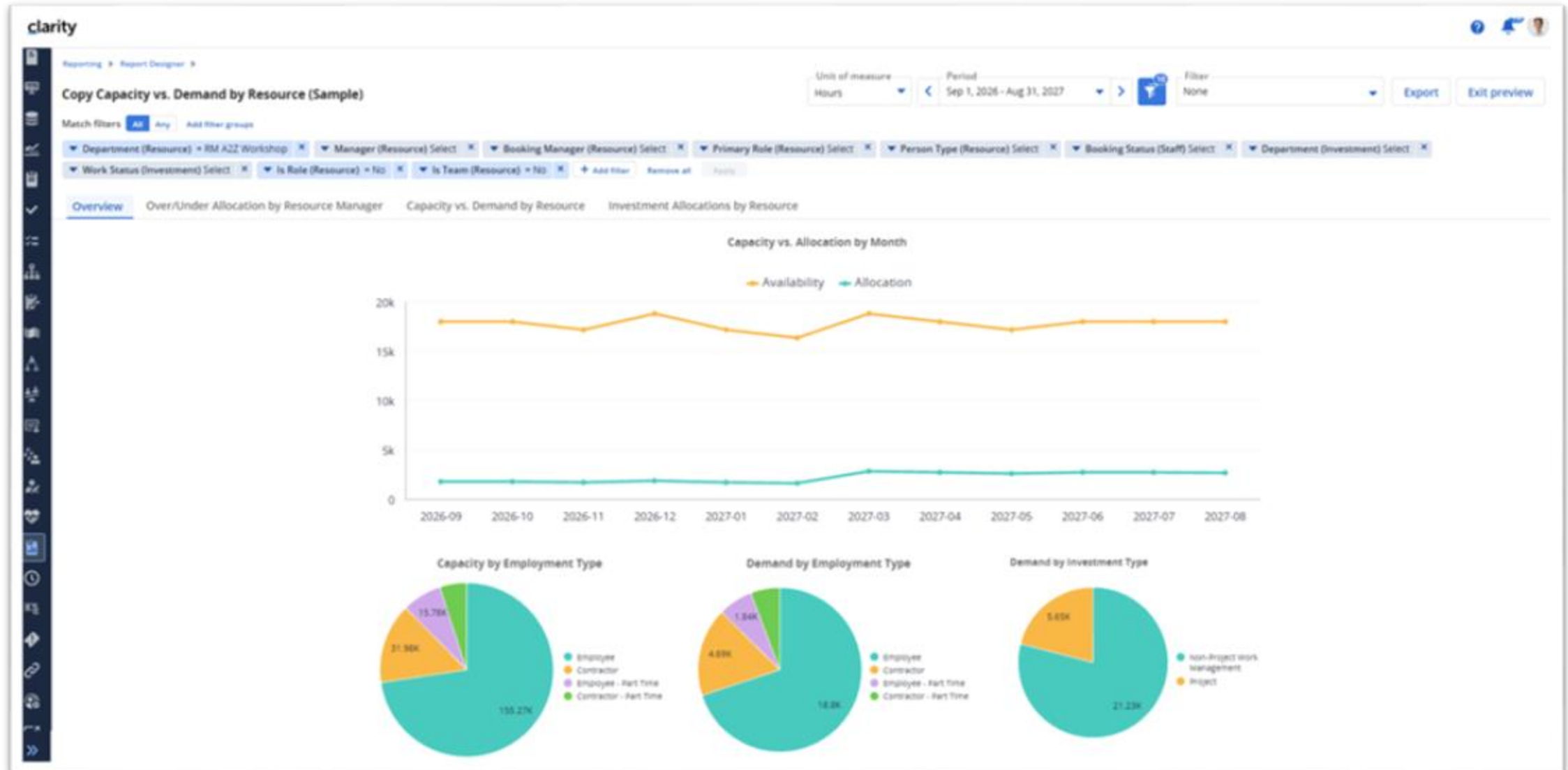
Investment Breakdown

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

Reporting Best Practices

- Create multiple views in Staffing to support different use cases
- Hierarchies (and dashboards w/in Hierarchies) are a great way to focus on a particular slice of data
- Data can be pulled into PowerBI reports OR into the new OOTB Reporting
- 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

Sample Report in the New Reporting Workspace



Notification Best Practices

- 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
 - Leadership summary reports for RMs and division managers

Implementation Best Practices

Some Rego Thoughts ...



More than any other competency,
successful resource management relies
on solid business processes.

33

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

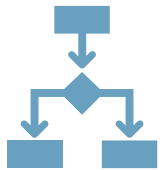
Stumbling Blocks

- 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

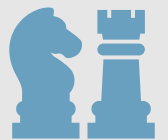
Implementation Best Practices – Start Simple



- 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.

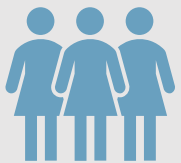
Implementation Best Practices – Design for Key Outputs



- 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

Align Tactical Processes with Decision Support Data Capture³⁶

Roles & Resources

- Integration, Admin or Resource Managers maintain
 - Primary Role
 - Availability
 - Resource pool OBS
 - Standard Calendar

Investment Staffing

- Investment Managers add Roles, Resources, or Teams to Investments and Enter Allocations over time
- Investment or Resource Managers replace Roles with named Resources on Investments (e.g. "Investment Staffing Process")
- Optional: Investment Managers create Assignments and enter ETC

Staffing Workspace+

- Balance Individual or Team workloads in Staffing
- Review Staffing to find and address upcoming demand / capacity gaps through staffing or planning changes
- Assess ability to deliver when planning new work in Roadmaps
- Assess impact of change in Staffing or Roadmaps

Decision Support Data

- 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?

Open Discussion

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



Recommended Maturity Path (Illustrative)



There is no singular path to maturity!
Your culture, business processes,
technical requirements, and other
considerations will dictate your journey!

Baseline

- Review/Affirm Capacity Methodology
- Audit Roles/Relationships
- Establish Calendars
- Auto-Hard Book in-flight



Uniform Allocations, Role-Based Demand

- Pilot base governance process
- Allocate from Estimates
- Soft/Hard Booking
- Use base views
- Retire custom legacy methods (if appropriate)



Refine and Expand

- Additional Views; Replace/Reallocate
- Manage by Exceptions; Monitor "Mixed"
- Labour Capitalization
- Evaluate Skills
- Evaluate Scenarios
- Evaluate Teams Investment
- Evaluate potential integrations



Evolve and Adapt

- Adjust Process and Views based on Lessons Learned
- Implement Skills if appropriate
- Implement Scenarios if appropriate
- Pilot Teams Investment if appropriate
- Pilot Workforce Planning if appropriate



Appendix and Reference Materials



Questions?



Survey



Please take a few moments to fill out the class survey.

Your feedback helps us improve future events.



Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



Important: Complete the class survey in the app after each session so your credits can be tracked.

More info: <https://regouniversity.com/certificates>

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- 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 = **Rego University**
- 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!
Remember to fill out the class survey.



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Website

<https://regouniversity.com/pmi-credits/>

Continue to Get Resources and Stay Connected

- 1 Use RegoXchange.com for instructions and how-to guides.
- 2 Talk with your account managers and your Rego consultants.
- 3 Sign up for webinars and join in-person Rego groups near you at RegoConsulting.com
- 4 Join us for the next [Rego University](#)!

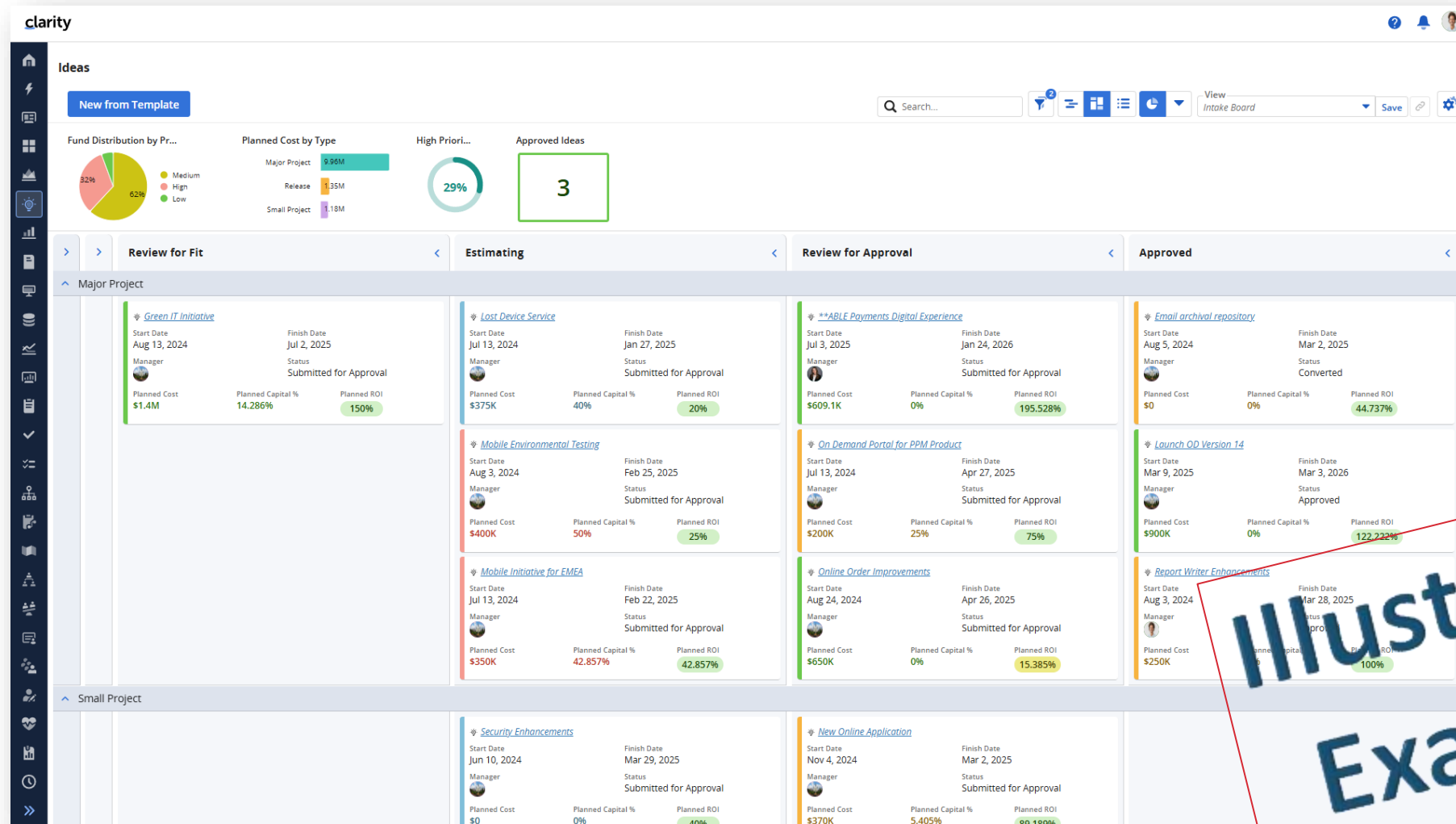


Persona-Based Considerations

Role Process Impact (L/M/H)	Business-Driven Questions	Key Activities	Clarity Capabilities/Views
PPM Team (High)	1. Is our data quality and accuracy within parameters? 2. Do people have the right access to the rights areas? 3. Are the processes being followed consistently? 4. Are we maintaining appropriate periodic reviews?	1. Maintain inventory of Resources, Roles, Skills 2. Manage Access Rights, OBS, Shared Views... 3. Audit RM processes and data 4. Configure calendar-dependent information	1. MUX Administration 2. MUX Resources 3. Studio Admin Calendars
Project Managers (High)	1. What roles and skills do I need to achieve my project's outcomes, and when? 2. Am I properly utilizing my Project Team Members? 3. What are potential conflicts that could impact me?	1. Follow current sizing/estimating procedures 2. Ensure Staff Allocations are updated and accurate throughout entire lifecycle of the work 3. Communicate regularly with Team Members	1. Project Staff Tab (Various view configurations) (Enable Properties Navigation in Blueprint) a) Resource>Investments 2. Projects List (Allocations/Total Usage/Variance %)
Team / Delivery Leaders (High)	1. What is my team working on, and when? 2. Are my people being properly utilized? 3. What new demand is coming my way, and what are the potential conflicts or constraints?	1. Maintain accurate Resource Capacity data 2. Consistently follow Demand/Supply processes 3. Act promptly on Resource Demand requests 4. Monitor performance and conflicts, communicate	1. Resources 2. Staffing: Staff (Crawl) 3. Staffing: Allocations by Investment (Walk/Run) 4. Staffing Scenarios - Both Views (Jog/Run)
Portfolio Managers (Mid)	1. Are the right people working on the right things? 2. What are the most critical resource constraints? 3. When is there capacity to take on new work? 4. What levers can I pull for unexpected changes?	1. Monitor Portfolio-Level Staffing Plans and KPIs 2. Continuously communicate with stakeholders 3. Monitor entire pipeline of in-flight & proposed work	1. Purpose-built Canvasses / dashboards (Self-Service) 2. Roadmaps 3. Hierarchies 4. Staffing Scenarios
BUs / Requestors (Mid)	1. What are the staffing needs for my request(s)? 2. How does a new request balance with in-flight work? 3. When can I anticipate my request to be staffed? 4. What conflicts or constraints might impact my work?	1. Submit requests in accordance with strategies, goals, and financial considerations 2. Follow current sizing/estimating procedures 3. Continuously communicate with stakeholders	1. Ideas/Projects (Demand-centric personalized views) 2. Roadmaps 3. Purpose-built reports (Push) 4. Purpose-built Canvasses / dashboards (Self-Service)
Executive Leaders (Low)	1. Can we successfully deliver on our commitments to the business? 2. What resource constraints or conflicts should I anticipate?	1. Participate in portfolio reviews as appropriate 2. Resolve conflicts requiring leadership decisions 3. Guide teams on priorities, targets, and KPIs 4. Advocate for process adherence and data quality	1. Purpose-built reports (Push) 2. Purpose-built Canvasses / dashboards (Self-Service)
Finance Partners (Low)	1. Do our staffing plans align with our financial commitments and forecasts? 2. Can we successfully deliver on our commitments to the business?	1. Participate in portfolio reviews as appropriate 2. Provide a financial lens for prioritization & staffing decisions 3. Assist in reconciling PPM Portfolio w/ Financial SoR	1. Purpose-built reports (Push) 2. Purpose-built Canvasses / dashboards (Self-Service)

Consistency in Demand Management

- Standardize the “Single Point of Entry” for review of new requests



Illustrative
Example

Staffing Optimization Made Simple (Project Managers)

- ? What's my "burn rate" on my Project Staff? (Allocation to Actuals Variance %)
- ? What other commitments could conflict with my Project Staff members?

clarity

Actions New from Template Search... Per-Period Metrics - 4 Periods View 000 MP Allocations ETC & Actuals Save

Select all Deselect all

Group by

Star...	Project Name	Start	Finish	Project Type	Totals	Allocation	ETC	Actuals	Allocation to Actuals Variance %	Allocation
☐	★ ABLE Payments	Jan 26, 2024	Dec 1, 2026	Major Project	1,996	642	899	55%		
☐	★ Digital Banking User Experience	Feb 16, 2024	Jan 1, 2026	Product Development	456	27	444	3%		
☐	★ DPM Loan App Rel 4.0	Feb 9, 2024	Dec 29, 2025	Product Development	952	16,261	1,247	(31)		
☐	★ eCommerce Portal	Dec 20, 2023	Oct 27, 2025	Major Project	1,282	0	856			
☐	★ GDPR Compliance - Loan Application	Apr 1, 2024	Apr 30, 2026	Major Project	1,611	283	476	70%		
☐	★ GlobalX Acquisition	Mar 14, 2024	Oct 27, 2025	Major Project	2,048	3,772	0	100%		
☐	★ Minimal Online Shopping Release 4.0	Jan 29, 2024	Aug 19, 2026	Product Development	5,588	2,318	476	91%		

Illustrative Example

clarity

33

70

00

91

Home

Lightning Bolt

Grid

Calendar

Chart

Document

Icon

Left Arrow

Right Arrow

Project Titles

ABLE PaymentsPR2009On Track

Properties

Tasks

Baselines

Financials

Staff

Assignments

Risks

Issues

Changes

Checklists

Status

Status Report

Dashboard

Action Items

Workflow

Documents

Conversations

Audit

D

Download

Add Staff

Per-Period Metrics - 12 Periods

View

000 MP, Remaining Availability and T...

Save

Settings

Select all

Deselect all

Resource Summary Mode

Group by

Staffing

2025-01

Conversation	Resource	Role	Remaining Availability	Total Usage
☐	Awad, Rashid	Engineer	184	
☐	Berry, Jason	Engineer	138	
☐	Bhatt, Rakesh	Engineer	184	
☐	Coleman, Joyce	Architect	(338)	
☐	Evans, Sean	Engineer	184	
☐	Fleming, Nicole	ML Engineer	138	
☐	Garcia, Alex	ML Engineer	(175)	
☐	Granger, Paula	Project Manager	184	
☐	Hayes, Justin	Architect	124	
☐	Lewis, Dana	Engineer	184	
☐	License Costs	Equipment	0	
☐	Morris, Tom	Architect	(6)	

1-20 of 20

Investments

Details

Conversations

Expand

Resource

Group	Investment	2025-01	Allocation	Actuals	ETC	Remaining Availability
Garcia, Alex (4)	Name		359 / 184	0	0	
	ABLE Payments		276	0	0	
	eCommerce Portal		46	0	0	
	Relocate Infrastructure to L...		37	0	0	
	Executive Business Insights		0	0	0	

1-5 of 5

Staffing Optimization Made Simple (Resource Managers)

- **Overallocated** = Allocated > Availability (Remaining Availability attribute)
- **Underallocated** = Allocated < Availability (Remaining Availability attribute)
- **Overutilized** = Total Usage > Allocation (Remaining Allocations attribute)
- **Underutilized** = Total Usage < Allocation (Remaining Allocations attribute)

Illustrative Example

Staffing

Scenario: -- Select --

Allocations by Investment

Allocations by Resource

Assignments by Investment

Assignments by Resource

Staff

Investments

Download

Per-Period Metrics - 12 Periods

4

View

000 MP_MyTeam "Crawl" 2.0

Save

Resource Summary Mode

Select all

Deselect all

Resource

Group	Investment	Investm...	Staffing	2026-01			2026-02			2026-03		
	Name			Type	Default Allocation	Allocation	Remaining Allocation	Remaining Availability	Allocation	Remaining Allocation	Remaining Availability	Allocation
>	Childers, Valerie (6)			26 / 176	0	898	37 / 160	0	735	41 / 176	0	
>	Coleman, Joyce (4)			105 / 176	0	283	96 / 160	0	257	108 / 176	0	
>	Dixon, Danielle (3)			105 / 176	0	212	105 / 160	0	164	116 / 176	0	
>	Hayes, Justin (5)			138 / 176	88	188	126 / 160	80	171	138 / 176	88	
>	McKay, Erin (9)			211 / 176	(18,435)	(317)	192 / 160	(24,679)	(288)	211 / 176	(7,758)	
>	Morris, Tom (5)			0 / 176	0	880	0 / 160	0	800	0 / 176	0	
▼	Ramos, Adriana (3)			214 / 176	(50)	(114)	194 / 160	(45)	(103)	214 / 176	(50)	
☐	Acme Managed Services	Project	50%	88	(50)	(38)	80	(45)	(34)	88	(50)	
☐	Digital Front Door Experience Enhancement	Project	100%	38	0	(38)	34	0	(34)	38	0	
☐	Successfactors Rollout		50%	88	0	(38)	80	0	(34)	88	0	

Open details

Star

Reallocate

Replace

Staffing Optimization Made Simple (Resource Managers)

- Personalize Views based on preference and Use Case
- In-UI edits and decision making, without the need for add-ons

Illustrative Example

clarity

Staffing Scenario: --Select--

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

Hide empty groups

Name	Role	Start	Finish	Allocation	Default Allocation	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12
Childers, Valerie		May 1, 2025	Jan 31, 2028	455		26	37	41	41	38	41	43	39	41	41	31	34
Coleman, Joyce		Jan 26, 2024	Feb 29, 2028	1,275		105	96	108	108	103	108	113	103	108	108	103	113
Cope, Michael		Jan 1, 2026	Jan 31, 2028	1,556		51	126	139	139	132	139	145	132	139	139	132	145
Market Landscape Intelligence System	Product Owner	Jan 1, 2026	Dec 31, 2027	600	100	51	46	51	51	48	51	53	48	51	51	48	53
Technical Debt Reduction Program	Product Owner	Feb 1, 2026	Jan 31, 2028	956	100		80	88	88	84	88	92	84	88	88	84	92
Dixon, Danielle		Jan 31, 2025	Jan 31, 2028	1,365		105	105	116	116	111	116	121	111	116	116	111	121
Hayes, Justin		Jan 26, 2024	Nov 30, 2027	1,026		138	126	138	223	48	50	53	48	50	50	48	53

Resource Availability

Full Name	Primary Role	Manager	Person Type	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12
Cope, Michael	Product Owner	Fowler, Ray	Employee - Part ...	51 / 88	126 / 80	139 / 88	139 / 88	132 / 84	139 / 88	145 / 92	132 / 84	139 / 88	139 / 88	132 / 84	145 / 92
Data Analytics Engineer		Fowler, Ray		281 / --	267 / --	302 / --	306 / --	292 / --	306 / --	320 / --	292 / --	306 / --	306 / --	292 / --	320 / --
Engineer		Fowler, Ray		2,374 / --	2,052 / --	2,441 / --	2,408 / --	2,252 / --	2,360 / --	2,467 / --	2,235 / --	2,342 / --	2,342 / --	2,071 / --	2,100 / --
Feinle, Kurt	Product Manager	Fowler, Ray	Employee	0 / 176	0 / 160	0 / 176	0 / 176	0 / 168	0 / 176	0 / 184	0 / 168	0 / 176	0 / 176	0 / 168	0 / 184
Fleming, Nicole	ML Engineer	Fowler, Ray	Employee	0 / 176	0 / 160	0 / 176	0 / 176	0 / 168	0 / 176	0 / 184	0 / 168	0 / 176	0 / 176	0 / 168	0 / 184
Granger, Paula	Project Manager	Fowler, Ray	Employee	214 / 176	195 / 160	214 / 176	214 / 176	205 / 168	214 / 176	224 / 184	205 / 168	214 / 176	214 / 176	205 / 168	224 / 184
Gupta, Minesh	Engineer	Fowler, Ray	Employee	220 / 176	200 / 160	220 / 176	220 / 176	42 / 168	44 / 176	46 / 184	42 / 168	44 / 176	44 / 176	42 / 168	46 / 184
Hayes, Justin	Architect	Fowler, Ray	Employee	138 / 176	126 / 160	138 / 176	223 / 176	48 / 168	50 / 176	53 / 184	48 / 168	50 / 176	50 / 176	48 / 168	53 / 184
Hayes, Todd	Security Architect	Fowler, Ray	Employee	211 / 176	193 / 160	211 / 176	211 / 176	211 / 168	211 / 176	211 / 184	211 / 168	211 / 176	211 / 176	211 / 168	211 / 184

Understand the Impacts of Staffing Decisions

Identify Best-Fit Resources Based on Roles AND Verified Skills/Experience

Resources

Resources Roles Teams

Search...

Select all Deselect all

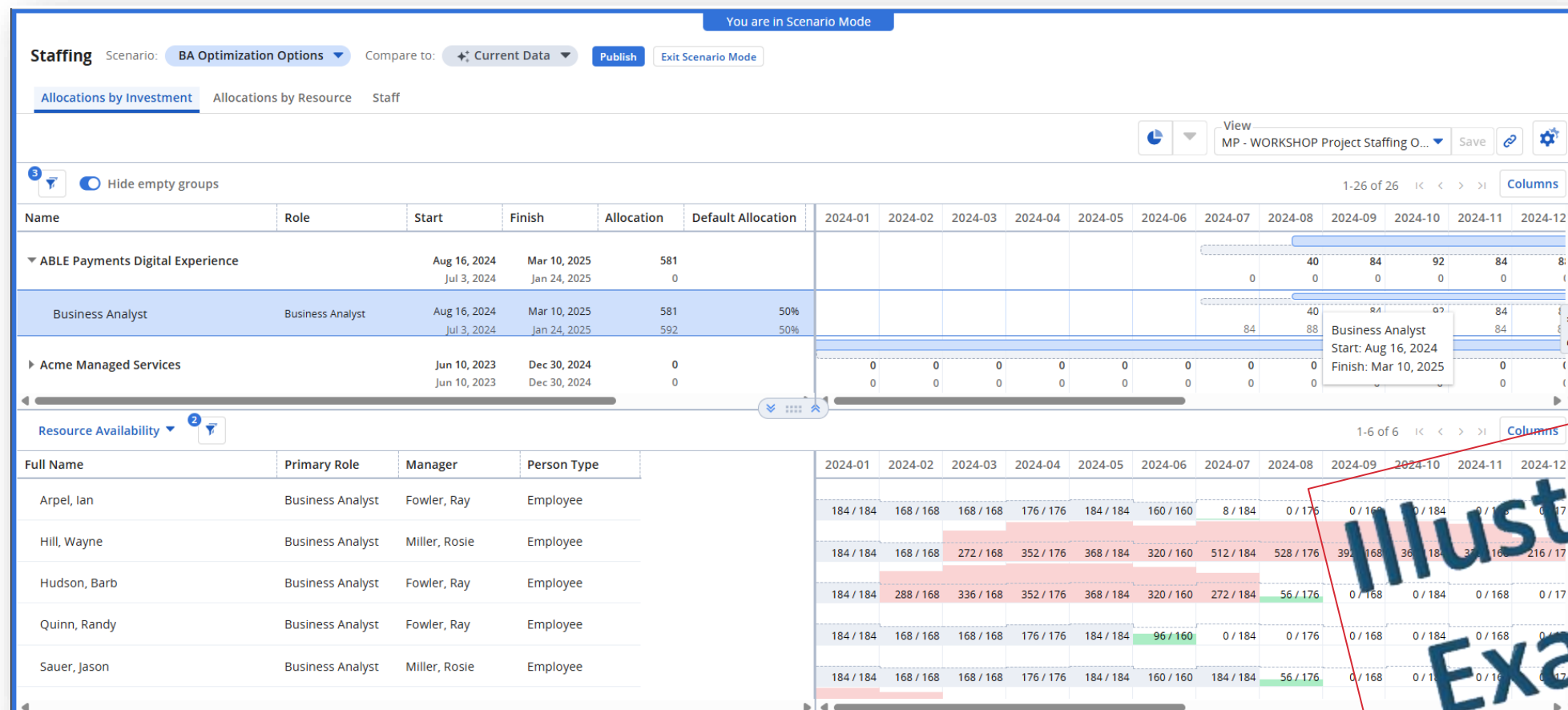
Group By

Full Name ↑	Resource ID *	Skills	Primary Role	Manager	Person Type	Resource Type
☐ Amos, Cheryl	cherylAmos	AutoCAD C++ Java JavaScript Microsoft Office Suite Power BI	Engineer	Joseph, Derrick	Employee	Labor
☐ Awad, Rashid	rashidAwad	JavaScript Power BI Six Sigma SQL Tableau	Engineer	Joseph, Derrick	Employee	Labor
☐ Baker, Isaac	issacBaker	Adobe Creative Suite Agile Methodologies Financial Analysis PMP	Manager	Joseph, Derrick	Employee	Labor
☐ Barry, Debra	debraBarry	Adobe Creative Suite PMP Six Sigma	Product Manager	Joseph, Derrick	Employee	Labor
☐ Bauer, Joyce	joyceBauer	AutoCAD AWS Certified Solutions Architect Cybersecurity	ML Engineer	Joseph, Derrick	Employee	Labor
☐ Bernard, Luc	lucBernard	Agile Methodologies Cybersecurity Financial Analysis Microsoft Office Suite	Project Manager	Joseph, Derrick	Employee	Labor
☐ Chapin, Tom	tomChapin	Content Creation Microsoft Office Suite Social media management	Solutions Marketing	Joseph, Derrick	Employee	Labor
☐ Chen, Chih-wei	chichen	AutoCAD AWS Certified Solutions Architect C++ Cybersecurity	Engineer	Joseph, Derrick	Employee	Labor
☐ Clark, Patrick	patrickClark	Adobe Creative Suite Mechanical design Microsoft Office Suite	Product Manager	Joseph, Derrick	Employee	Labor
☐ Cope, Michael	michaelCope	Adobe Creative Suite Agile Methodologies Microsoft Office Suite Network ma	Product Owner	Joseph, Derrick	Employee - Part...	Labor
☐ Dixon, Danielle	danielleDixon	Agile Methodologies C++ Java JavaScript Python	Architect	Joseph, Derrick	Employee	Labor
☐ Evans, Nick	nickEvans	AWS Certified Solutions Architect C++ Java Power BI	UX	Joseph, Derrick	Employee	Labor
☐ Feinle, Kurt	kurtFeinle	Adobe Creative Suite PMP Six Sigma	Product Manager	Joseph, Derrick	Employee	Labor
☐ Garcia, Noa	noagarcia	AutoCAD AWS Certified Solutions Architect C++ Cybersecurity	Engineer	Joseph, Derrick	Employee	Labor
☐ Gaurand, Alicia	aliciaGaurand	Adobe Creative Suite AWS Certified Solutions Architect Java SQL	QA	Joseph, Derrick	Employee	Labor
☐ Gillian, Erin	erinGillian	AutoCAD AWS Certified Solutions Architect C++ Cybersecurity	Engineer	Joseph, Derrick	Employee	Labor
☐ Grant, Lily	lilyGrant	Agile Methodologies Cybersecurity Financial Analysis Microsoft Office Suite	Project Manager	Joseph, Derrick	Employee	Labor

Illustrative Example

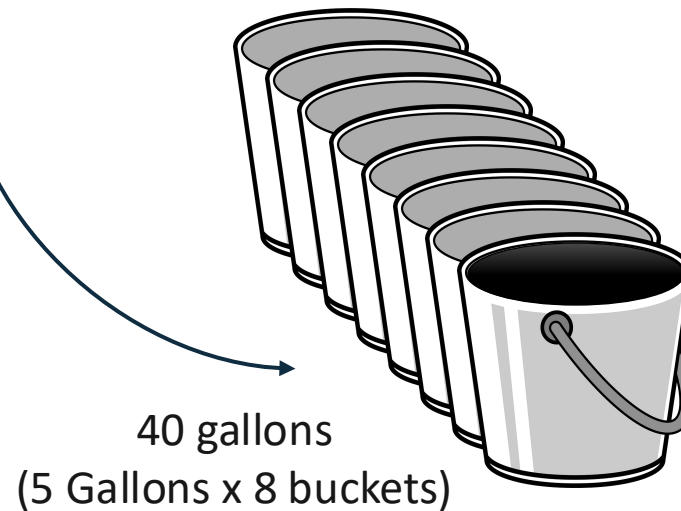
Understand the Impacts of Staffing Decisions (OOTB)

- “What-If” Resource Planning Scenarios
- Randy Quinn has availability, but Barb Hudson is a better fit. What if we pushed the Start?



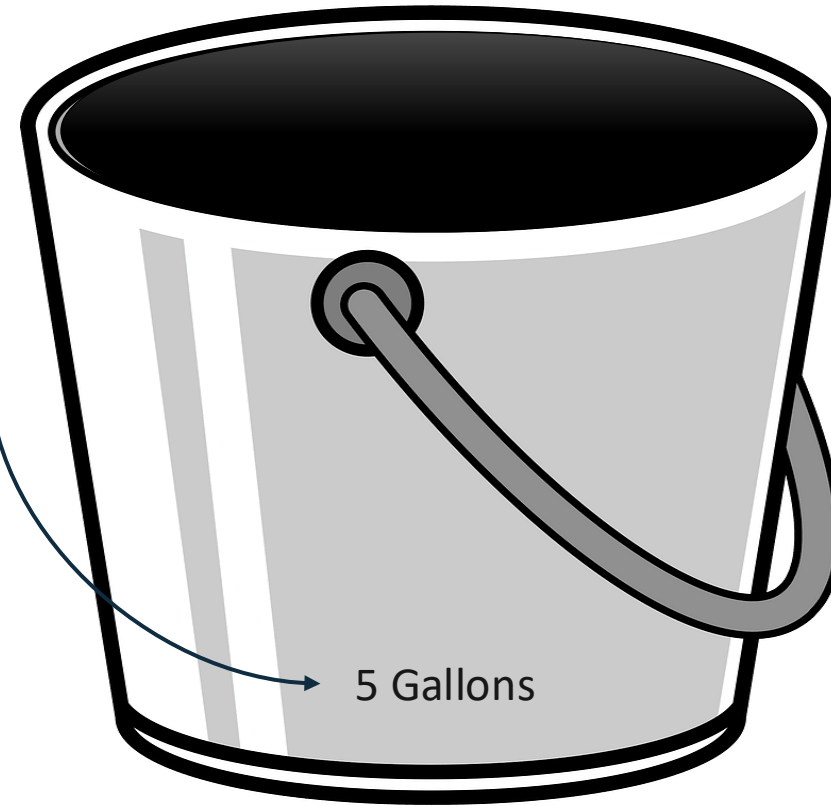
Staffing Decisions (Operational Definitions)

- Capacity
(or “Availability”)



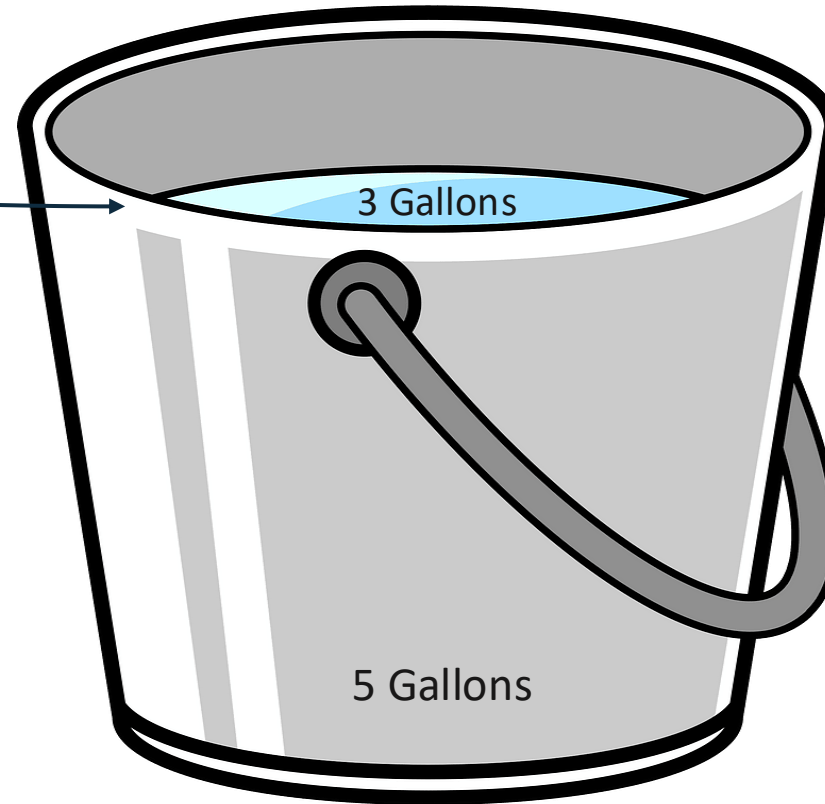
Staffing Decisions (Operational Definitions)

- Allocations



Staffing Decisions (Operational Definitions)

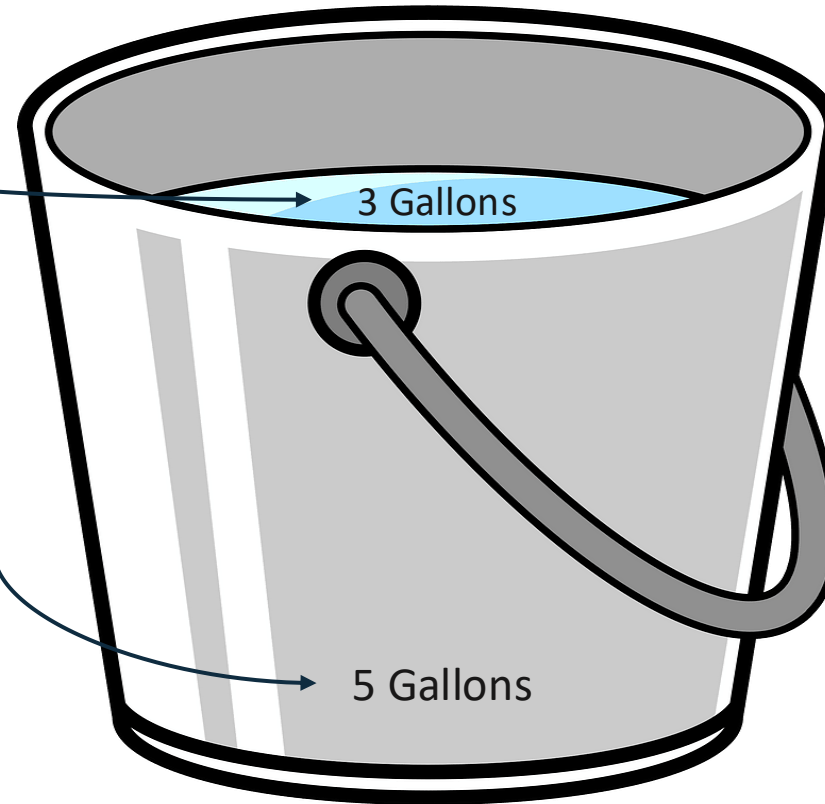
- Allocations
- **Actuals**



Staffing Decisions (Operational Definitions)

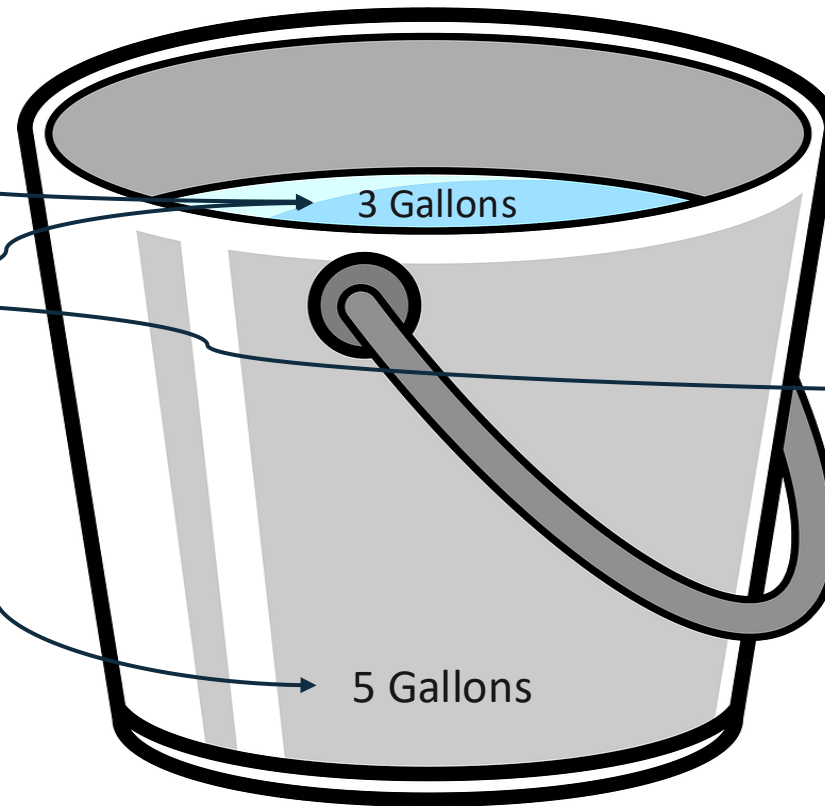
- Actuals

- Allocations



Staffing Decisions (Operational Definitions)

- Actuals
- **Total Usage**
(4 Gallons)
- Allocations



Staffing Decisions (Operational Definitions)

- Allocations (5 gallons)
- Actuals (4 gallons)
- Total Usage (4 gallons)
- **Remaining Allocations**
(1 gallon)
(Allocations – Total Usage)
+ means unused allocation
- means not enough allocation
0 means “Just Right”

