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Resource Management A to Z Hands-on Workshop

Your Guides:
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Agenda

- Introduction: Participant Poll
- Fundamentals: Why, What, and How
- Group Exercise Part One: Establishing Demand and Supply
- Break
- Group Exercise Part Two: Review and Respond to Demand

Introduction: Current Challenges *(Slido Poll)*

Please complete this quick poll to help us understand more about your current state.

Scan the QR code
Or join at slido.com
Using **#3987707**

Resource Management and Capacity Planning: *WHY?*

Broadly speaking, resource management and capacity planning are about optimizing your organization's resources for near-term operations and long-term planning.

Effective resource management and capacity planning help organizations:

- Align resources and strategic priorities
- Balance workloads and reduce staff overutilization and underutilization
- Mitigate project risks
- Make data-driven portfolio decisions
- Increase their 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	Resource Management Related Capability
Resources	Understand *who* and *what* resources exists, key information about those resources, and how much time they have available
Investment Staff (& Assignments)	*Who* (or what resource qualities) are planned for each investment, and how much time is required?
Timesheets	How much time *was* spent on different investments?
Staffing Workspace	Analyze data above to view workloads, staffed and unstaffed demand, and create what-if scenarios
Roadmap	Plan Investments based on 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)

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 term is often used 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.

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

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

Term	Definition
Assignment	The granular execution level where a resource is linked to a specific work breakdown structure (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.
Actuals	The verified effort (hours) already worked and recorded. 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.

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

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

Term	Definition
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 that the resource will perform on the project (e.g., architect, developer, manager, scrum master, business analyst, QA, security architect). Roles are typically **NOT** synonymous with job titles.
Skill	Typically, a “tag” that identifies 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,” “Robotic Process Automation (RPA),” “Python,” “Cybersecurity and Threat Analysis,” “UX Design”)

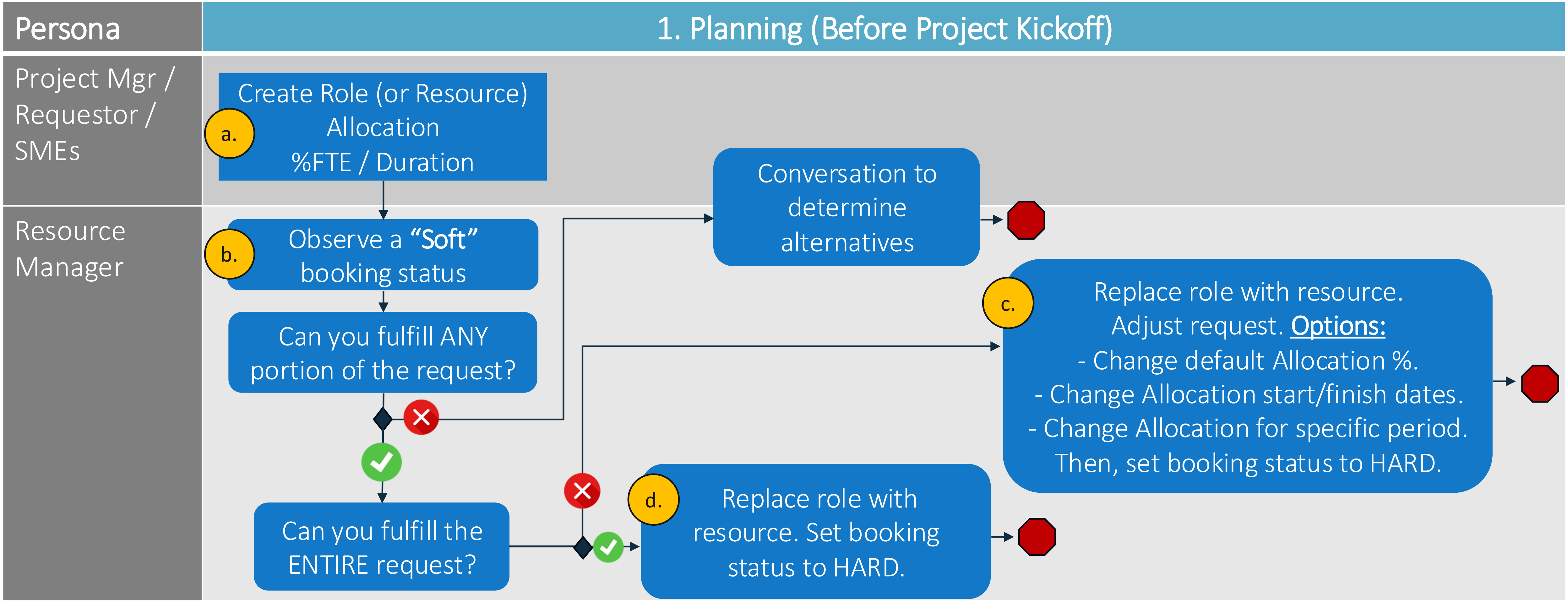
***These concepts will be discussed at greater length in subsequent sections.**

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

Term	Definition
Staff	Synonymous with the Project Team, this refers specifically to the module or tab within a Project or Idea where you account for role, resource, or team allocations.
Team	A specific module and investment object in Clarity that can be used as a “container” for multiple roles and resources. This allocates the whole team, regardless of which resource will actually perform the work. A resource can have their capacity distributed across multiple teams, and also receive individual allocations.

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

Resource Planning and Booking Processes



Notes

- Assumes we are working in a Project. Booking named resources to an Idea is not a best practice.
- Requires configurations and saved views as per Best Practice Procedures example.
- "Staffing Scenarios" may be used to evaluate options prior to Hard booking.
- As a best practice, "Hard Allocation" field should NOT be manually edited.
- Use Conversations to add context and notifications as appropriate.

Resource Planning and Booking Processes

Persona	2. Execution (In-Flight Changes)
Project Manager / Requestor / SMEs	a. Update Resource Allocation (Default % or specific period)
Resource Manager	b. Observe a **“Mixed”** Booking Status and/or **“Non-Default”** indicator Do you approve the change? c. **Options:** - Contact project manager to discuss alternatives. - Compare “Allocation” with “Hard Allocation.” - Review Audit Trail data for Allocation. - Change Allocation as acceptable. Then, set booking status to HARD. d. Set booking status to HARD.
Notes	• Updates to Allocation could be initiated either by the project manager or by the resource manager. • Requires configurations and saved views as per Best Practice Procedures example. • “Staffing Scenarios” may be used to evaluate options prior to Hard Booking. • As a best practice, “Hard Allocation” field should NOT be manually edited. • Use Conversations to add context and notifications as appropriate.

Group Exercise

Overview and Objectives

Group Exercise Parameters and Overview

Objective: Practice common resource management methods:

- Set resource capacity (supply)
- Initiate requests for roles and resources (demand)
- Determine the options for responding to these scenarios

Work in pairs. One person will act as the project manager, the other as the resource manager.

- If time allows, we will switch roles and repeat.

At the end of the second session, we will review and discuss outcomes using shared dashboards.

Login to the lab server: **https://bit.ly/RegoU26** (case sensitive)

Username: **rma2z<##>** (where <##> is your #, for example: **rma2z02**)

Password: **RegoU2026!**

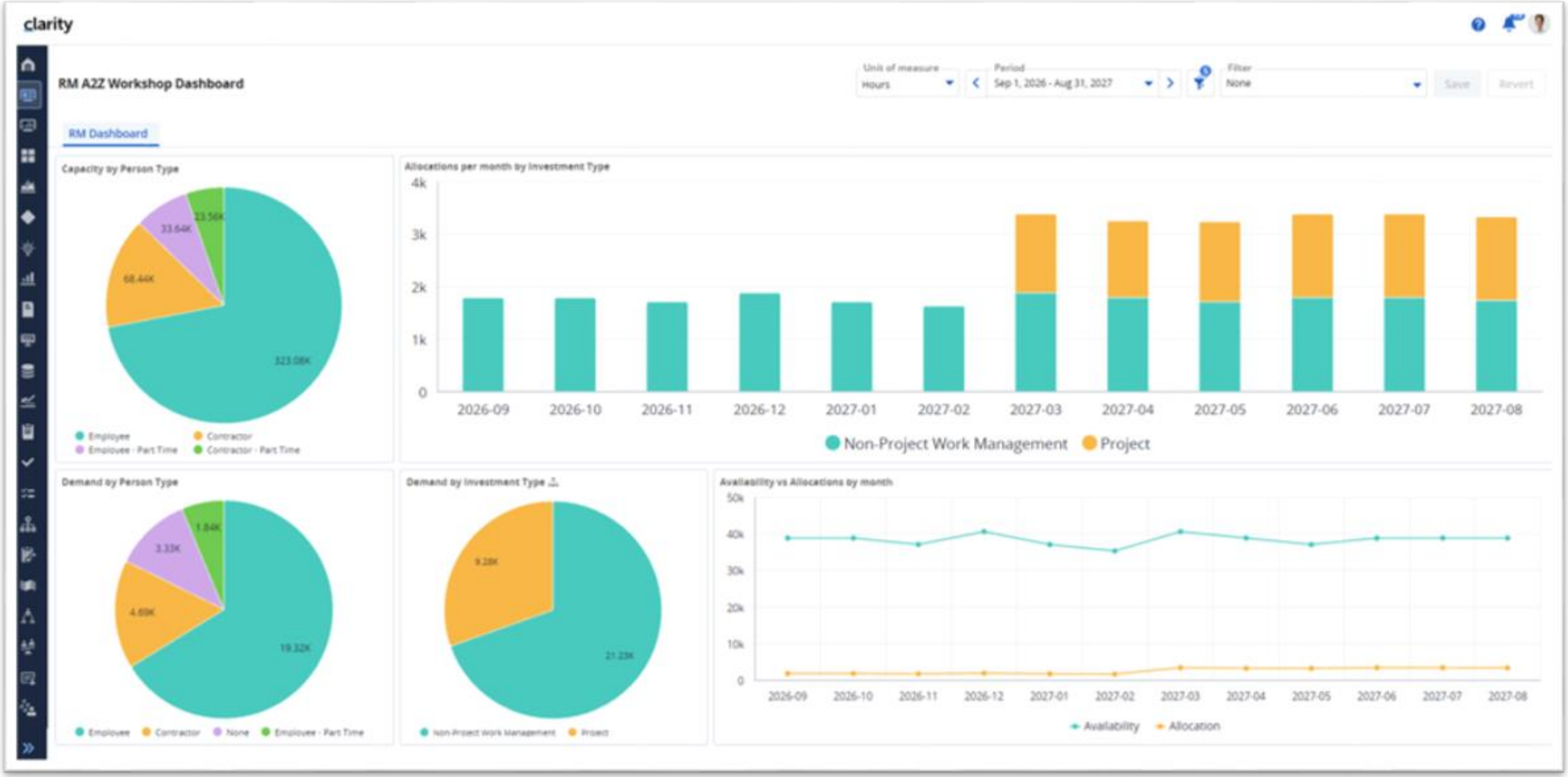
Printed login instructions are also on your tables

Group Exercise – Part One
(Break: 2:15 – 2:30)

Establishing Supply and Demand

See handouts for detailed instructions

RM Dashboard Data Snapshot: Before



Group Exercise – Part Two

Review and Respond to Demand

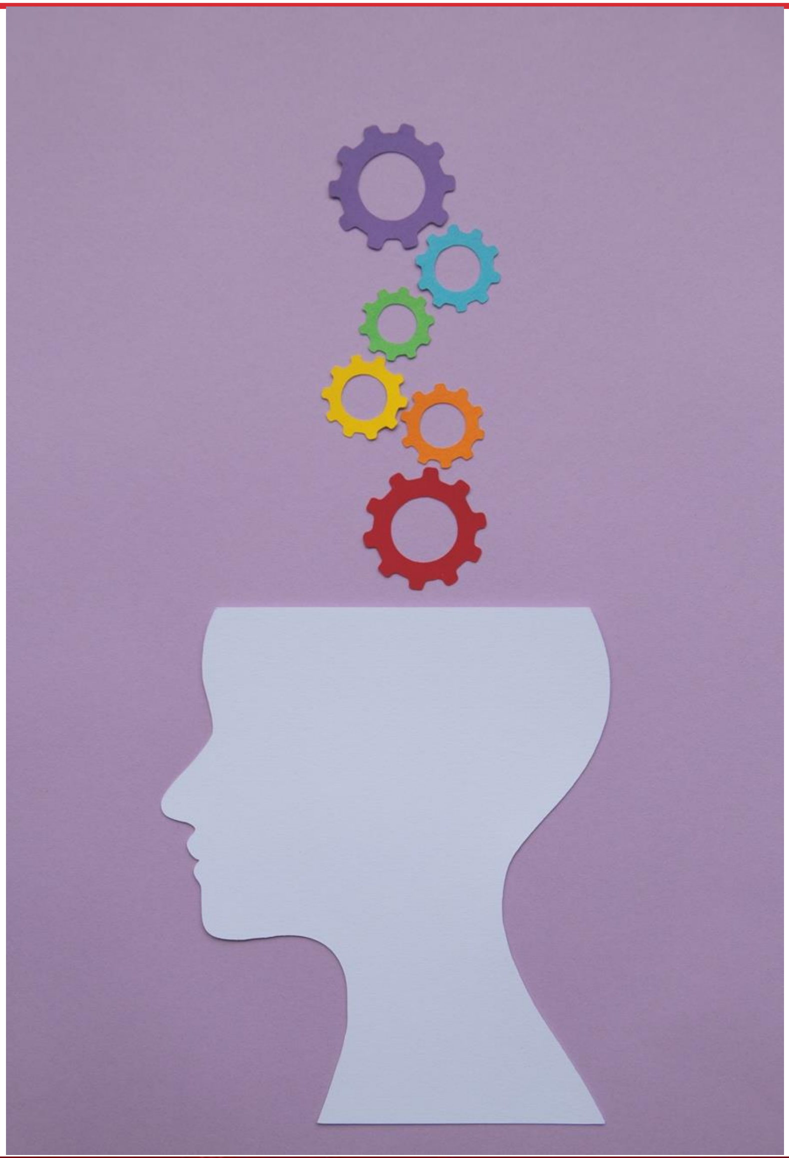
See handouts for detailed instructions

Wrap-up

Insights, Call to Action, Q&A

Insights and Takeaways

- What was that experience like for your group? What unexpected challenges did you encounter?
- Did you notice any similarities to the supply and demand processes in your organization?
- What is one key idea or capability that you can apply in your organization?
- What “wins” or innovative resource management solutions have you have implemented in your organization?



Questions?

Survey

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

Your feedback is extremely important for future events.

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- Click on **I agree** and **Submit**

Let us know how we can improve!
Remember to fill out the class survey.

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