



Capacity and Budgeting: Planning and Delivery Execution in Targetprocess

Your Guides:



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Agenda

- Position Management
 - Track to org/team
 - Rate management
 - Job profiles
- Team Aligned to Towers
- Team Allocations vs. User Allocation
- Proposed Budgets

Introductions

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

What is Position Management

Position management is the *strategic process of defining, organizing, and overseeing positions within an organization — independent of the individuals who occupy them.*








It focuses on **roles**, not people, enabling clearer workforce planning, budgeting, and organizational design.

1. Defining and tracking positions independent of employees
2. Strategic workforce planning
3. Creating structured role clarity
4. Enabling accurate budgeting and forecasting
5. Promoting accountability and transparency

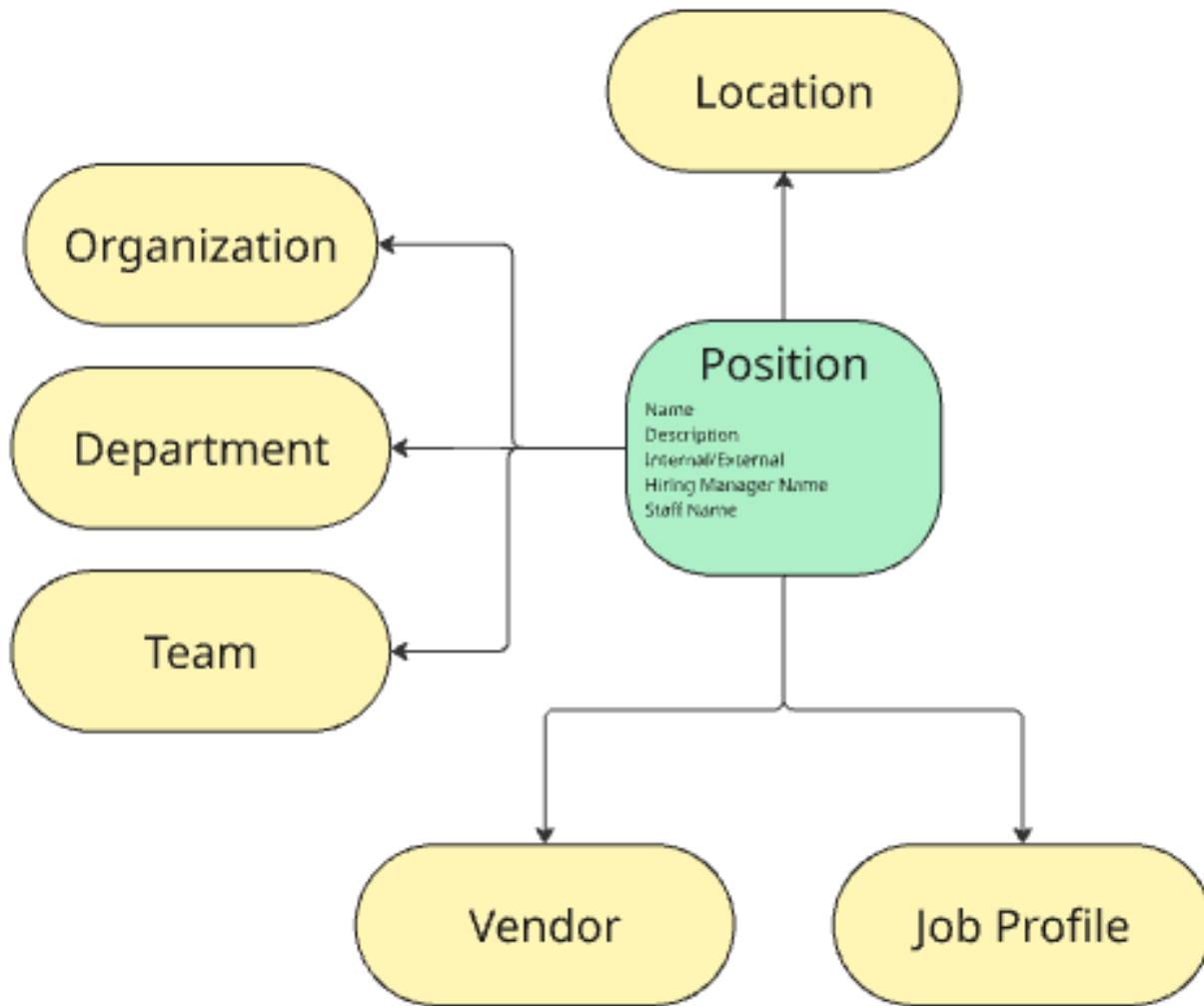


Benefits of Position Management



-  Clear role definitions and reduced ambiguity
-  Accurate workforce planning and forecasting
-  Improved budgeting and cost control
-  Strategic alignment of roles to business objectives
-  Faster response to organizational change
-  Better career pathing and employee development
-  Stronger analytics and data-driven decision making

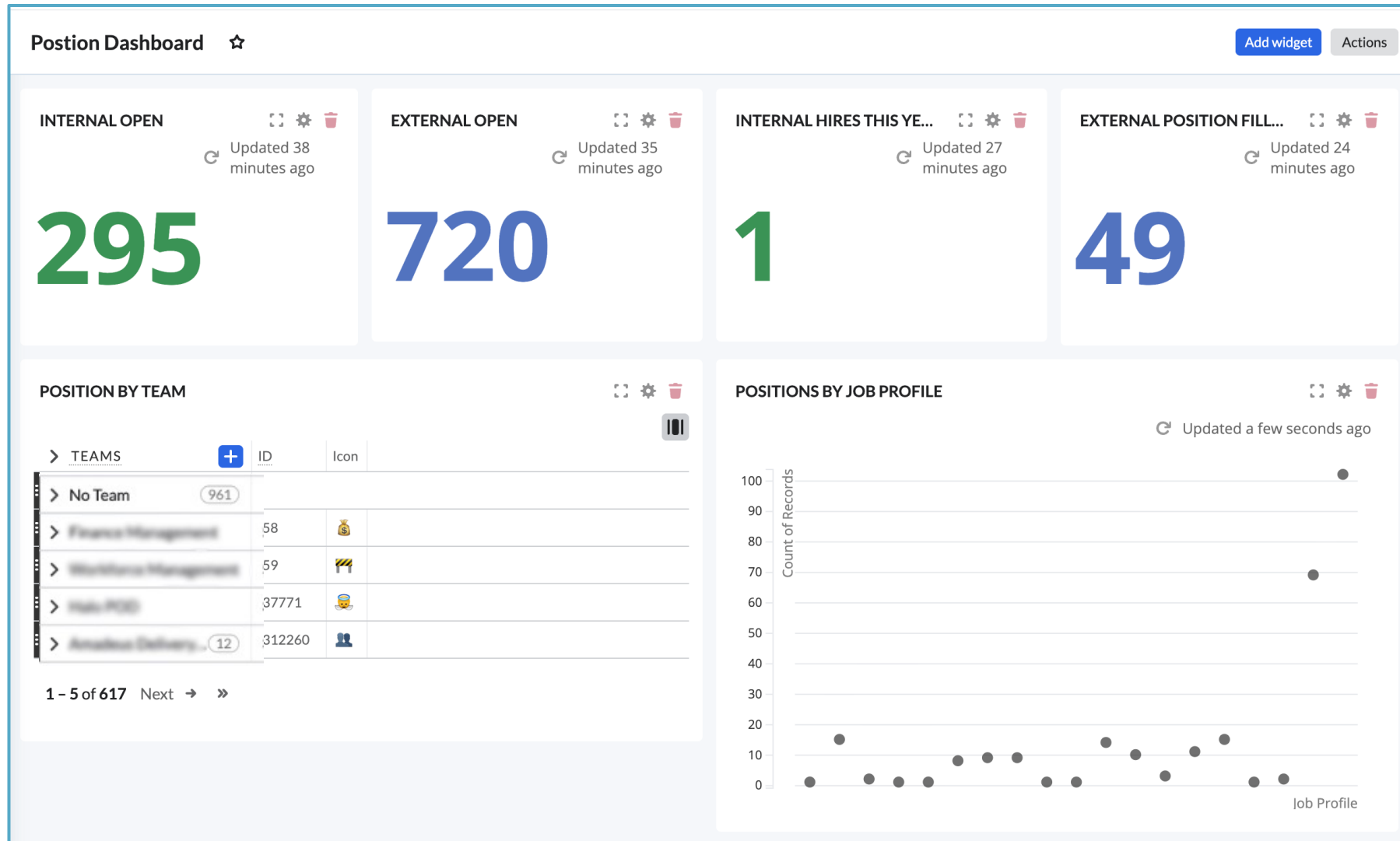
Example of Position Model



This model provides:

- Filled and open positions dataset
- Meta data of position
- Trends of position
- Improved forecasting

Position Management in ATP

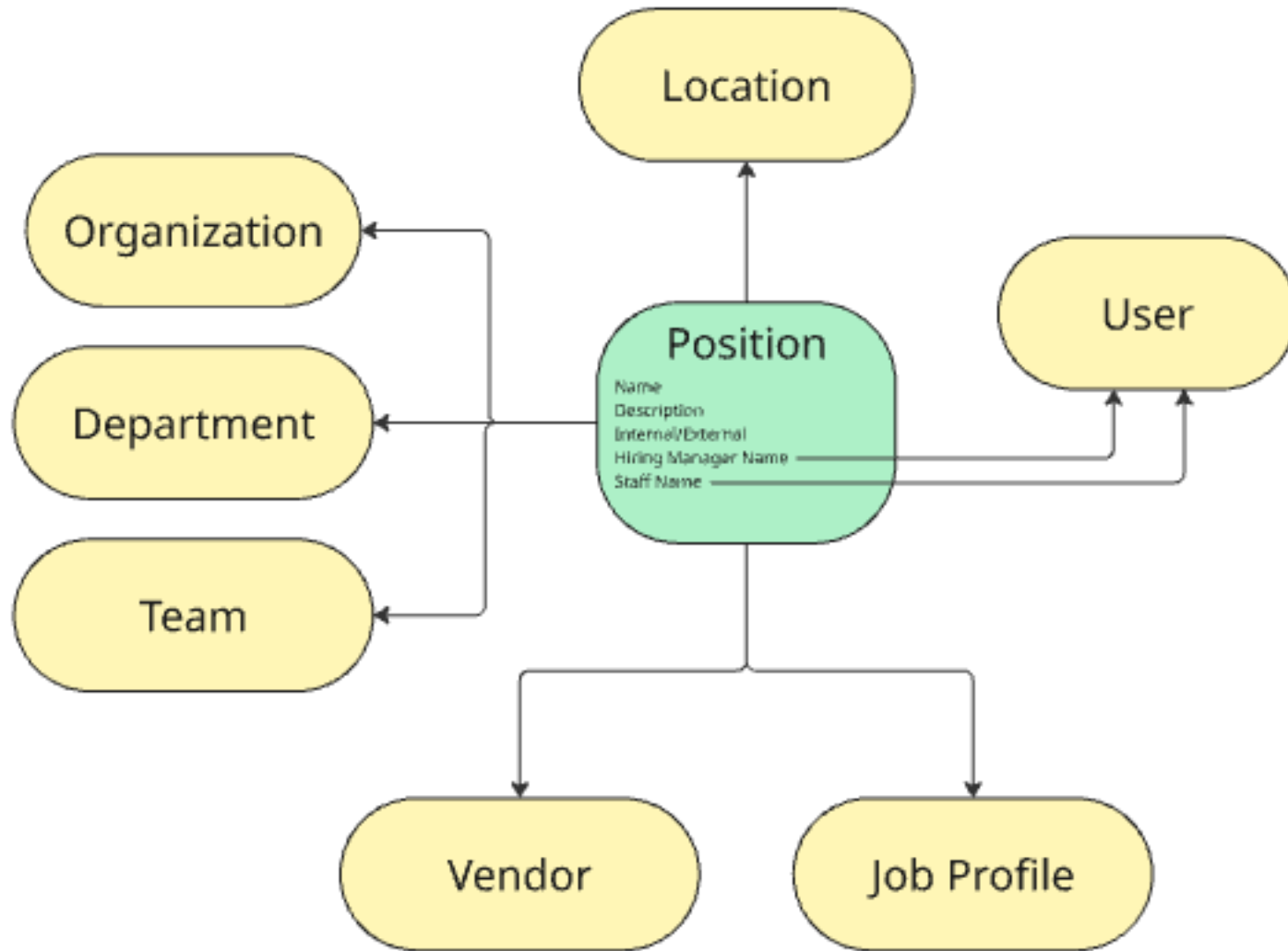


Discussion

- ❓ Do you use position management in your Organization?
- ❓ What are the benefits you have seen from position management?
- ❓ What tools do you use for position management?



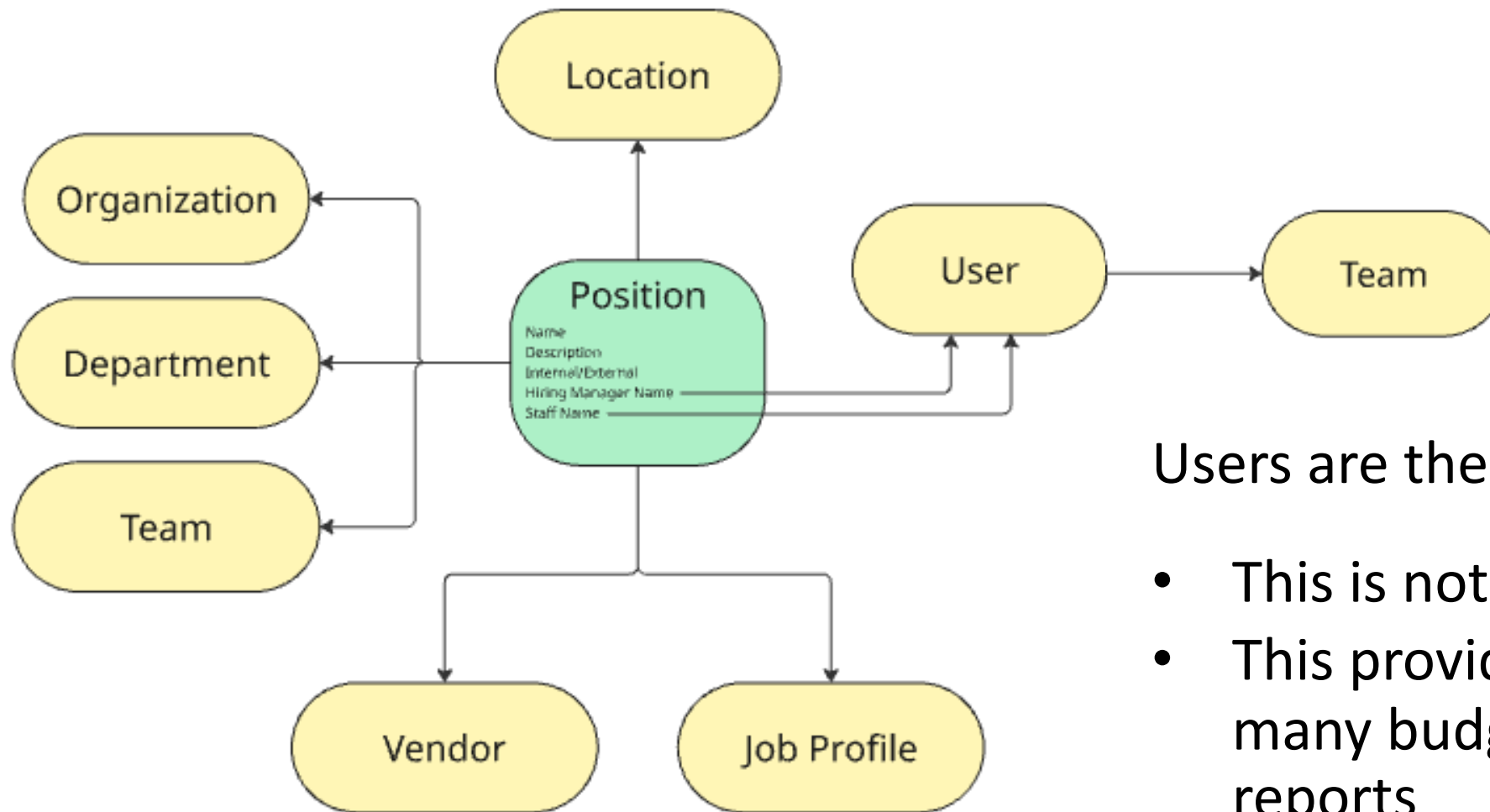
Filling Positions



With the positions defined:

- Users are assigned to the position they fill
- Open positions have no user
- Reports and metrics: open/filled by ...

Organizing Staff Into Teams



Users are then assigned to teams:

- This is not duplication
- This provides relationships for many budget and financial reports

Teams Aligned to Towers

- Structure teams so that they are equal to subtowers or in some cases subtower elements
- This works best for infrastructure teams
- Application teams will need to be addressed separately, but they can be tagged to the application tower
- Create an attribute to tag a team to a tower
- Push team attributes to TBM Studio to use as a mapping in the labor allocation

Examples

- Compute – Server
- Database – Oracle
- Network – Lan/Wan

This method fully automates the labor allocation to towers and integrates it into the position management process

Methods for Allocating Application Teams

- Option 1
 - Use run vs. grow
 - Run work = application support
 - Grow work = application development
- Option 2
 - Categorize the work
 - KTLO = application support
 - Development = application development
- Option 3
 - Use capitalization
 - OpEx = Application Support
 - CapEx = Application Development

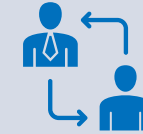


Allocation Strategy



Team Allocations:

- Faster to plan and easier to adjust
- Encourages collective ownership
- Avoids bottlenecks when someone is sick or blocked



User Allocation

- Requires more upfront planning and maintenance
- Clearer ownership and helps spot overloaded
- Work requires specific skills

Recommendation: perform as much planning with team,
but there will be some user allocations

Targetprocess Demonstration

IT Planning Demonstration

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