



regoUniversity 2019

SAN DIEGO

RMO | Creation and Optimization

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Introductions

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



Agenda

- Defining the Resource Management Office (RMO)?
- RMO Operating Model
- Process And Policy
- Reporting Strategy
- Organizational Change Management (OCM) Strategy
- How Do We Get There?

Part I: Defining the RMO



Let Rego be your guide.

What Problems Are We Trying to Solve?

- We don't know who is working on what on an enterprise level.
- I keep hearing we don't have enough people to do all the work; is this true? How would I know?
- Resource planning and forecasting is ad hoc, via spreadsheets, via multiple systems, difficult to get a clear picture beyond the next few weeks...
- I don't have visibility into resource issues ahead of time, only when conflicts arise.
- Why am I still seeing resources in my team that left the company 6 months ago?

Who owns trying to figure this all out?

Purpose of a Resource Management Office

Ensure the organization has the **proper process and tools** in order to **proactively understand** if there are enough people to deliver on the work that has been requested/ promised and be able to **adjust as needed**

Provides governance of resource related data and **data reporting quality**

Drives alignment of resources to work in support of **organizational strategic objectives**

What Does An RMO Actually Do?



TACTICAL RESPONSIBILITY

- Resource Data
- Resource Management Process
- Resource Management Reporting
- Time Entry Compliance
- Resource Forecasting Compliance
- Resource Manager Training / Mentoring



STRATEGIC RESPONSIBILITY

- Strategic Labor Reporting
 - Strategic vs Support Cost
 - Role Capacity vs Demand
 - % Of Contractor vs Internal
- Vendor Management Performance
- Organizational Change Management

PMO vs RMO

Project Management Office (PMO)

1. Owner of the project management execution process
2. Project management governance framework stewards
3. Owner of project/portfolio reporting – health, status, financial forecasting
4. May own the Project and Portfolio Management (PPM) Tool from a product perspective
5. Supports and mentors project managers

Resource Management Office (RMO)

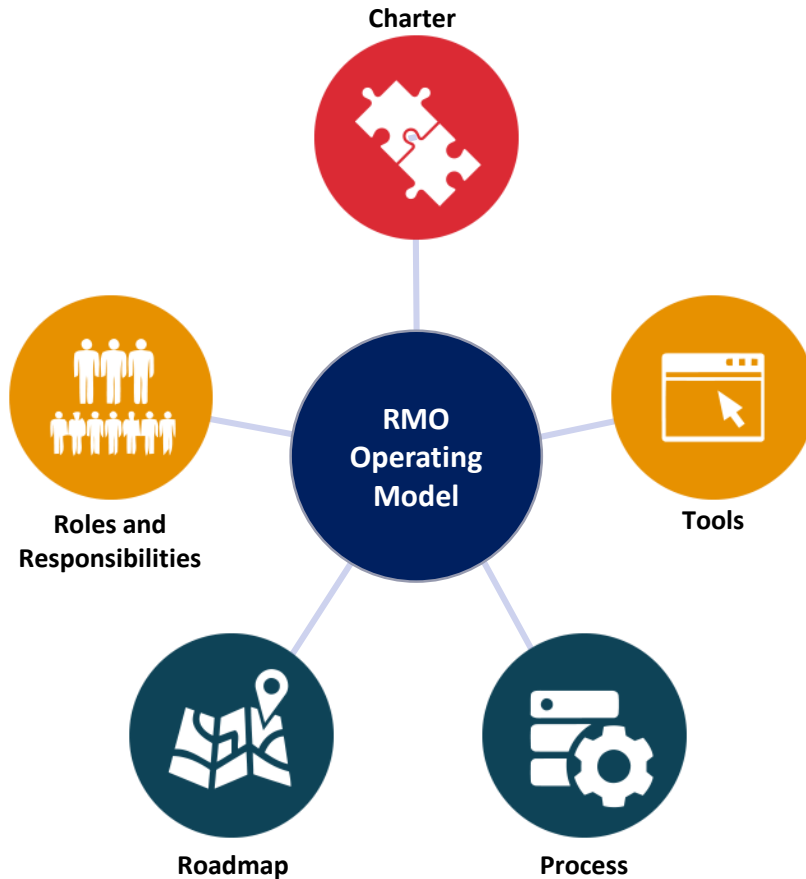
1. Owner of the resource planning and forecasting process
2. Owner of resource data, analysis and aggregation
3. Owns PPM vendor management/ processes
4. A Centralized resource management/ compliance entity
5. Supports and mentors resource managers and project managers

Part II: RMO Operating Model



Let Rego be your guide.

RMO Operating Model



The Operating Model defines the structure of an RMO, the roles and responsibilities of the team, and the role the RMO plays supporting the organization.

Components of the Operating Model

1. Charter

Purpose and goals of the RMO

2. Tools

Software and reporting tools required to support the RMO

3. Process

What business processes will the RMO own/ not own? How will the RMO ensure process is followed, data is accurate? How will the RMO factor into decision making?

4. Roadmap

What capabilities will be rolled out, and when?

5. Roles and Responsibilities

Who will do what within the RMO?

Roles and Responsibilities of the RMO

Role	Description
RMO Lead	Develop, own, and mature resource management processes, RMO operations, and reporting cadence in support of the RMO Charter. Works with senior management to understand portfolio priorities and associated resource impact. Helps define strategic Resource Management targets and reports.
Data Analyst	Pulls standard compliance reports for time tracking and forecasting. Ad-hoc reporting of Clarity data. Analyzes data to understand trends, areas of excellence, areas for improvement.
Process & Tool SME	Assists with ongoing mentoring and training of Clarity Resource Management and Project Management users. Mentoring activities including 1:1s, workshops, open office hours, and ad-hoc training as needed.
Analyst	Reviews the data and works with resource and project managers to ensure that all resource related data is up-to-date and accurate. This can include rate, cost center, role and organizational categorization of Resources.



These roles can be combined or separated depending on the organization

The RMO Maturity



RMOs typically have a lifecycle that requires more resources during the start until the resource planning process is part of the culture.

Then RMs/PMs pick up the bulk of the execution and the RMO transitions to a support, analytics, and arbitration for the organization.

Part III: Process & Policy



Let Rego be your guide.

RMO Processes – Resource Data Governance



RMO needs to ensure that all data being reported is accurate and complete.

If resources have missing/wrong rates, managers, roles, or departments the value of all resource reporting will be questioned.

Determine the value proposition of using Clarity's Skills capability for Resource Management.

The basis of all good RMO practices and reporting begins with data governance.

RMO Policy – Resource Data Governance

Common Policy considerations regarding Data Governance



Resource Updates for Role, Manager, Cost Center must be submitted via stated process

Rate changes must be submitted in advance

Termination of Resources; Employees and Contractors

RMO Processes – Time Entry



The RMO manages the time entry process

- Who must enter time?
- Who will approve time?
- Cadence for submission?

This results in compliance reporting

- The Naughty List

Tip: Consider recognition for teams who are consistently compliant over time

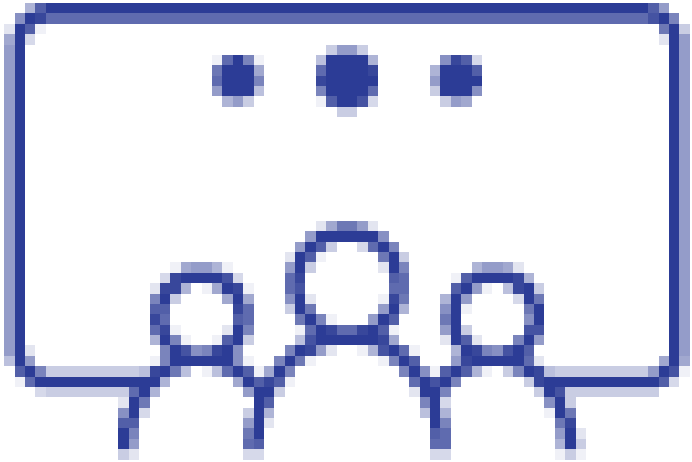
RMO Policy – Time Entry



Time Entry Policies need to be established.

- How long can time periods stay open?
- Time Entry daily? Weekly? Other?
- How to account for non-Project work?
 - Other Work vs Support Project
- How to account for Holiday Time
- OOO Time For Contractors

RMO Processes – Resource Planning / Forecasting



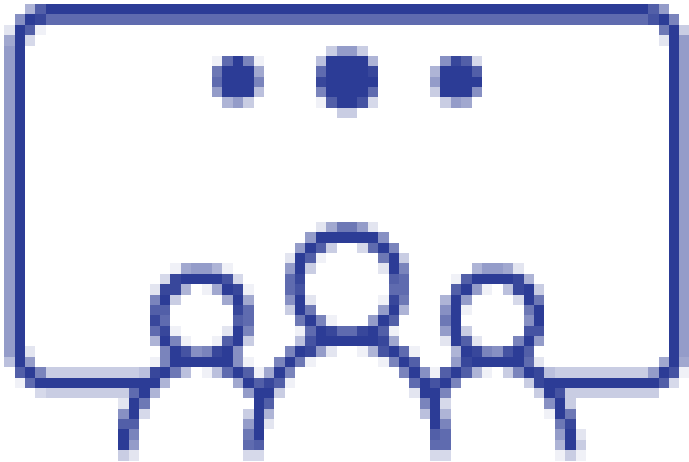
RMO will manage the Resource Planning and Forecasting process.

- Role, Resource, or Team Allocations
- Who can add resources or roles to investments
- Allocation vs ETC demand
- Formal requisitions
- Booking status

RMO Policy – Resource Planning / Forecasting

RMO will manage the Resource Planning and Forecasting policies. Examples:

- Role Allocation is used in Ideas (Demand Management)
- Project Managers can add roles to Projects, but Resource Managers add the named resources
- Max allocation within compliance is 120%
- Task level Estimates must be complete by Wednesday of each week
- All booking status must be hard booked by Wednesday of each week
- Review of Pending Actuals each week prior to posting



RMO Processes – Vendor Management



RMO will need to engage in some vendor management activities and reporting.

- Onboarding of Vendors in the PPM Tool
- Onboarding of Resources in the PPM Tool
- Pre-set Term Dates
- Ensuring Offboarding process
- Resource Vendor Changes
- Transition from Vendor to Internal
- Rates
- T&M vs Fixed Cost
- Vendor Based Reporting

RMO Policy – Vendor Management



RMO Vendor Policies within Clarity

- Timesheet data must match invoicing
- Hard Time Period Close Policy
- Fixed Cost Resources do not enter time
- Real Rates vs Aggregate Rates

Part IV: RMO Reporting



Let Rego be your guide.

RMO Reporting Strategy

The mature RMO is responsible for two levels of reporting.

- Project / Resource Manager Level Reporting on Capacity vs Demand
- Strategic Enterprise Level Reporting – Cost Center, Department Role, and Internal vs External Labor

RMO – Project / Resource Manager Level Reporting

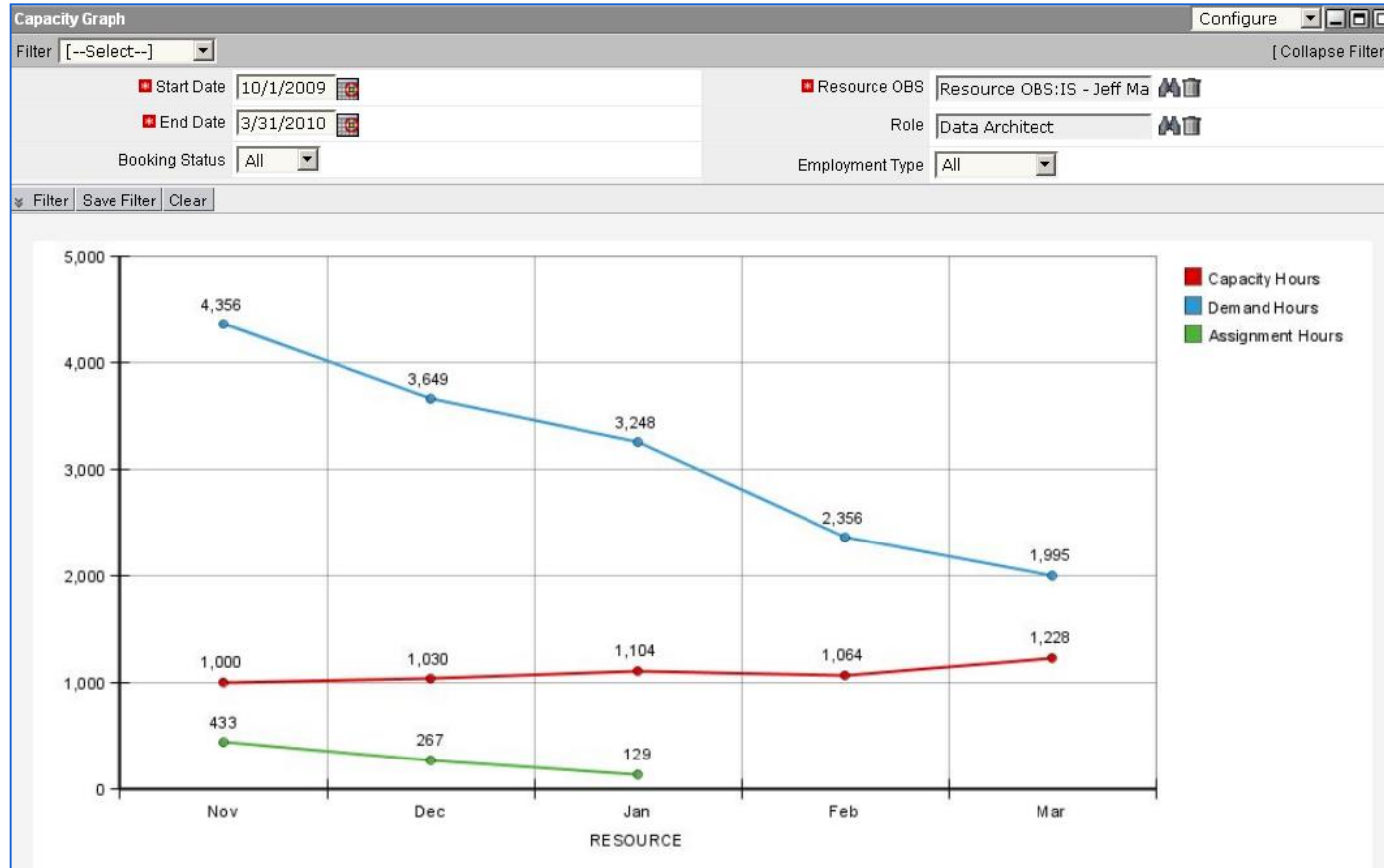
Project

- Resource is not overutilized within one project
- Views to see key resource utilization across investments
- Pending Actuals
- Last timesheet posted

Resource Manager

- Views of Allocation, Assignment, and Demand by Resource Manager, Cost Center, Team
- Resource Manager Level Timesheet Compliance
- Resource Manager Level Forecast Compliance

RMO – Project / Resource Manager Level Reporting



Good Places to Start:

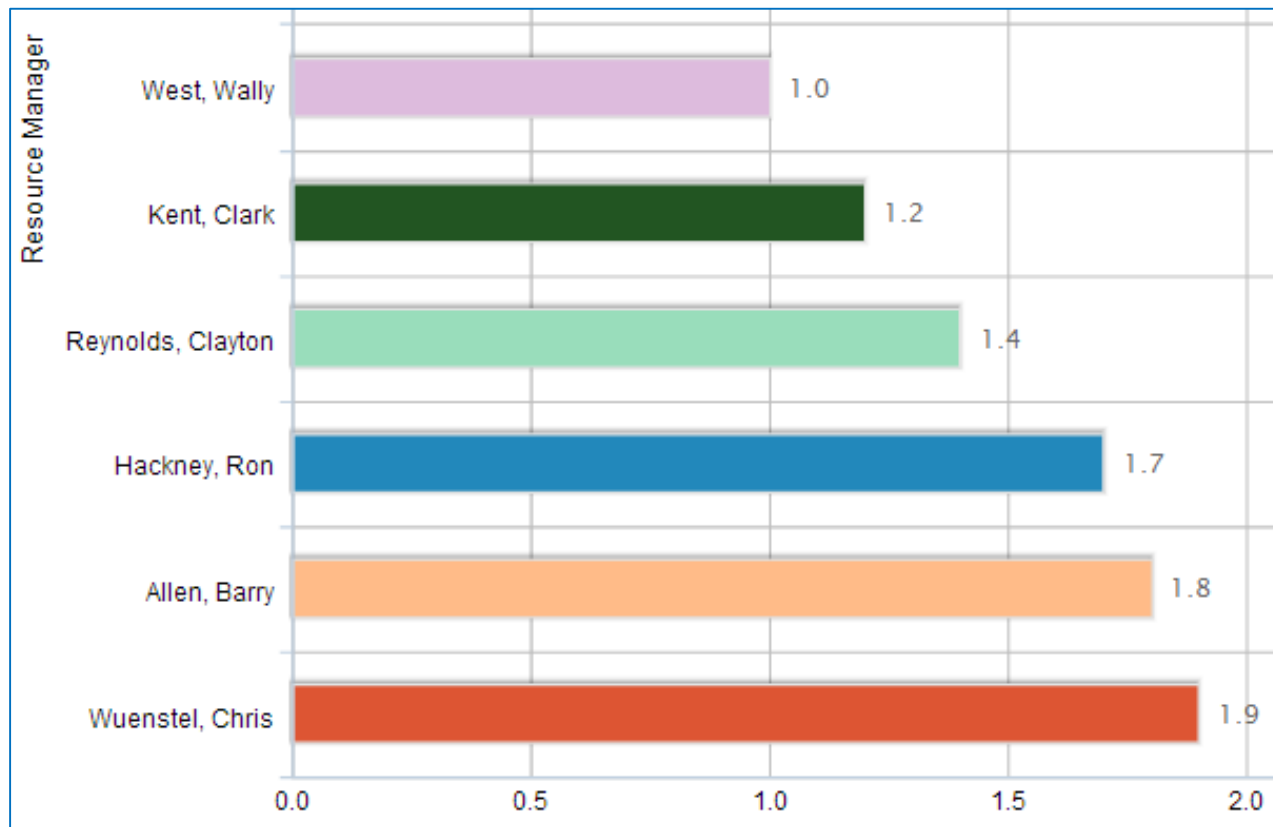
- Capacity Graph
- Resource Availability – 4 Weeks
- Weekly Detail
- Resource Workloads
- Unfilled Requirements
- Allocation Discrepancy
- Capacity – Role Capacity Histogram
- Organizational Demand – OBS Resource Aggregation
- Organizational Demand – OBS Investment Aggregation
- Down Planning – Top Down Planning by Investment
- Last Login

Black = OOTB

Blue = Rego Exchange

RMO – Project / Resource Manager Level Reporting

Goal: Ensure resource managers are successfully using Clarity to manage resource needs within their teams and departments; Show compliance with a RegoXchange asset that evaluates each resource manager based on compliance to local process and policy.



Good Places to Start:

- [Rego Resource Adoption Metrics](#)
- RM and Resource email notifications

Black = OOTB
Blue = Rego Exchange

RMO – Strategic Reporting

Strategic Reporting

- % Internal vs External Labor
- % External Labor on BAU / Back office Functions
- % Spend by Vendor
- Strategic vs Support Labor
- Enterprise Level Timesheet Process Compliance
- Enterprise Level Forecast Process Compliance
- Capacity Demand by Role – Determine Enterprise Resource Needs

RMO – Strategic Reporting

Capacity vs. Demand by Role														
Role		Allocation by Month (Hours)												
		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total
Architect	Capacity	1,408.00	1,280.00	1,408.00	1,408.00	1,344.00	1,408.00	1,472.00	1,344.00	1,408.00	1,408.00	1,344.00	1,472.00	16,704.00
	Demand	910.80	871.42	1,667.75	1,290.20	951.40	1,200.80	1,472.00	867.30	934.72	940.81	788.41	733.20	12,628.80
	Remaining Capacity	497.20	408.58	-259.75	117.80	392.60	207.20	0.00	476.70	473.28	467.19	555.59	738.80	4,075.20
Business Analyst	Capacity	1,584.00	1,440.00	1,584.00	1,584.00	1,512.00	1,584.00	1,656.00	1,512.00	1,584.00	1,584.00	1,512.00	1,656.00	18,792.00
	Demand	738.80	688.00	1,603.24	1,341.80	1,593.40	1,734.80	1,241.20	926.10	904.11	912.81	703.40	1,641.20	14,028.80
	Remaining Capacity	845.20	752.00	-19.24	242.20	-81.40	-150.80	414.80	585.90	679.89	671.19	808.60	14.80	4,763.20
DBA	Capacity	528.00	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	552.00	6,264.00
	Demand	526.40	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	27.60	5,738.00
	Remaining Capacity	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	524.40	526.00
Developer	Capacity	1,936.00	1,760.00	1,936.00	1,936.00	1,848.00	1,936.00	2,024.00	1,848.00	1,936.00	1,936.00	1,848.00	2,024.00	22,968.00
	Demand	1,631.20	1,588.96	1,497.64	2,705.20	2,251.61	1,705.19	1,649.80	894.60	902.76	858.19	1,822.60	714.80	18,222.55
	Remaining Capacity	304.80	171.04	438.36	-769.20	-403.61	230.81	374.20	953.40	1,033.24	1,077.81	25.40	1,309.20	4,745.45
Network Engineer	Capacity	1,232.00	1,120.00	1,232.00	1,232.00	1,176.00	1,232.00	1,288.00	1,176.00	1,232.00	1,232.00	1,176.00	1,288.00	14,616.00
	Demand	377.61	335.04	435.86	344.69	938.80	830.60	713.39	494.80	499.60	375.60	208.81	1,202.40	6,757.30
	Remaining Capacity	854.39	784.96	796.14	887.31	237.20	401.40	574.61	681.20	732.40	856.40	967.19	885.60	7,858.70
Project Manager	Capacity	2,288.00	2,080.00											
	Demand	1,560.03	1,567.04											
	Remaining Capacity	727.97	512.96											
Test Engineer	Capacity	1,760.00	1,600.00											
	Demand	1,086.01	1,057.62											
	Remaining Capacity	673.99	542.38											
Grand Total	Capacity	10,736.00	9,760.00											
	Demand	6,830.83	6,588.08											
	Remaining Capacity	3,905.17	3,171.92											

Over/Under Allocation by Resource								
Resource		Primary Role	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15
Test Engineer	Amos, Cheryl	Developer	0.00	0.00	0.00	0.00	8.00	8.00
	Bauer, Joyce	Network Engineer	0.00	0.00	0.00	20.00	8.00	8.00
	Berks, Paul	Project Manager	16.00	0.00	0.00	-45.31	-13.99	8.00
	Berry, Jason	Developer	0.00	0.00	0.00	-44.00	-68.00	8.00
Grand Total	Bhatt, Rakesh	Storage Architect	0.00	0.00	160.00	52.00	48.10	48.10
	Childers, Valerie	Architect	0.00	0.00	0.00	-113.60	-56.80	8.00
	Evans, Nick	Business Analyst	0.00	0.00	0.00	0.00	0.00	0.00

Over/Under Allocation by Resource														
Resource	Primary Role	Remaining Capacity by Month (Hours)												
		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total
Amos, Cheryl	Developer	0.00	0.00	0.00	0.00	8.00	46.00	64.00	80.00	0.00	0.00	0.00	0.00	198.00
Bauer, Joyce	Network Engineer	0.00	0.00	0.00	20.00	8.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	148.00
Berks, Paul	Project Manager	16.00	0.00	0.00	-45.31	-13.99	-28.00	0.00	0.00	0.00	0.00	0.00	0.00	-71.30
Berry, Jason	Developer	0.00	0.00	0.00	-44.00	-68.00	-100.00	-40.00	-168.00	-76.00	-16.00	0.00	0.00	-512.00
Bhatt, Rakesh	Storage Architect	0.00	0.00	160.00	52.00	48.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.10
Childers, Valerie	Architect	0.00	0.00	0.00	-113.60	-56.80	-17.60	0.00	0.00	0.00	158.40	151.20	115.60	237.20
Evans, Nick	Business Analyst	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	0.00	0.00	0.00	0.00	-40.00
Gaurand, Alicia	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.00	125.00	27.00	28.00	16.00	336.00
Granger, Paula	Project Manager	0.00	0.00	0.00	136.00	168.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	304.70
Lewis, Dana	Business Analyst	0.00	0.00	0.00	0.00	0.00	-16.00	-18.00	-78.10	-176.00	-176.00	-168.00	-80.00	-712.10
Lewis, Paul	Project Manager	-8.00	-12.00	0.00	0.00	13.99	-21.00	-55.99	-2.10	22.00	8.00	113.99	104.00	162.89
Martin, Paul	Project Manager	0.00	0.00	12.00	0.00	-168.00	-144.00	-196.00	-130.00	-176.00	0.00	0.00	0.00	-802.00
Moreau, Erin	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-17.00	-16.00	-80.60	-113.60
Morris, Tom	Architect	0.00	0.00	-4.00	120.00	32.00	80.00	-102.00	-32.00	0.00	0.00	0.00	0.00	94.00
Parker, Ashley	Business Analyst	0.00	0.00	-54.00	-100.00	-84.00	-56.00	-32.00	0.00	0.00	0.00	0.00	0.00	-326.00
Patel, Sanjay	Developer	0.00	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	0.00	0.00	0.00	0.00	-122.00
Perez, Carlos	Project Manager	0.00	0.00	0.00	0.00	0.00	0.00	-84.00	-168.00	-176.00	-100.88	-168.00	-80.00	-776.88
Quinn, Randy	Network Engineer	0.00	0.00	0.00	108.91	72.40	27.00	65.01	2.10	22.00	0.00	43.99	0.00	341.41
Reed, Henry	Project Manager	-4.00	-8.00	0.00	-140.00	-160.00	-120.00	-104.00	0.00	0.00	0.00	68.00	84.00	-384.00
Reilly, Jason	Test Engineer	0.00	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10
Riviera, Alex	Project Manager	0.00	0.00	0.00	0.00	-16.00	-34.00	-26.00	-168.00	-176.00	-17.60	-168.00	-84.00	-609.60
Sampson, Mike	Test Engineer	0.00	0.00	0.00	36.00	-36.00	-88.00	-8.00	28.00	24.00	176.00	8.00	18.00	158.00
Stewart, Diane	Storage Architect	17.60	-15.00	0.00	-10.60	-32.80	62.40	21.60	11.20	158.40	-158.40	-51.20	-65.60	-62.40
Stoneburg, Sam	Network Engineer	0.00	0.00	0.00	130.00	144.00	28.00	120.00	36.00	24.00	176.00	168.00	184.00	1,010.00
Thompson, Peter	Project Manager	-8.00	0.00	0.00	-25.31	-13.99	-11.00	-57.00	0.00	0.00	0.00	-34.99	16.00	-134.29
Turner, Bruce	Test Engineer	0.00	0.00	0.00	76.00	-52.00	-178.00	28.70	26.00	117.00	16.00	0.00	0.00	33.70
Walker, Terry	Test Engineer	12.00	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00
Grand Total		25.60	-11.00	114.00	124.09	-438.39	-480.30	-479.88	-524.90	-331.60	-1.48	-93.01	63.40	-2,033.27

Good Places to Start:

- Capacity vs. Demand by Resource
- Capacity vs. Demand by Role
- Over/ Under Allocation by Resource
- Capacity Overview Portlet
- Role Capacity Portlet

Black = OOTB
Blue = Rego Exchange

Part V: Organizational Change Management (OCM)



Let Rego be your guide.

RMO – OCM

Any rollout of PPM Tools and Functions require the deployment of Organizational Change Management OCM.












The RMO must own the **organizational change management** aspects of implementing enterprise resource management. This includes communication plans, training, mentoring, launch events, and ongoing support.

Part VI: How Do We Get There?



Let Rego be your guide.

RMO – Assess Where You Are

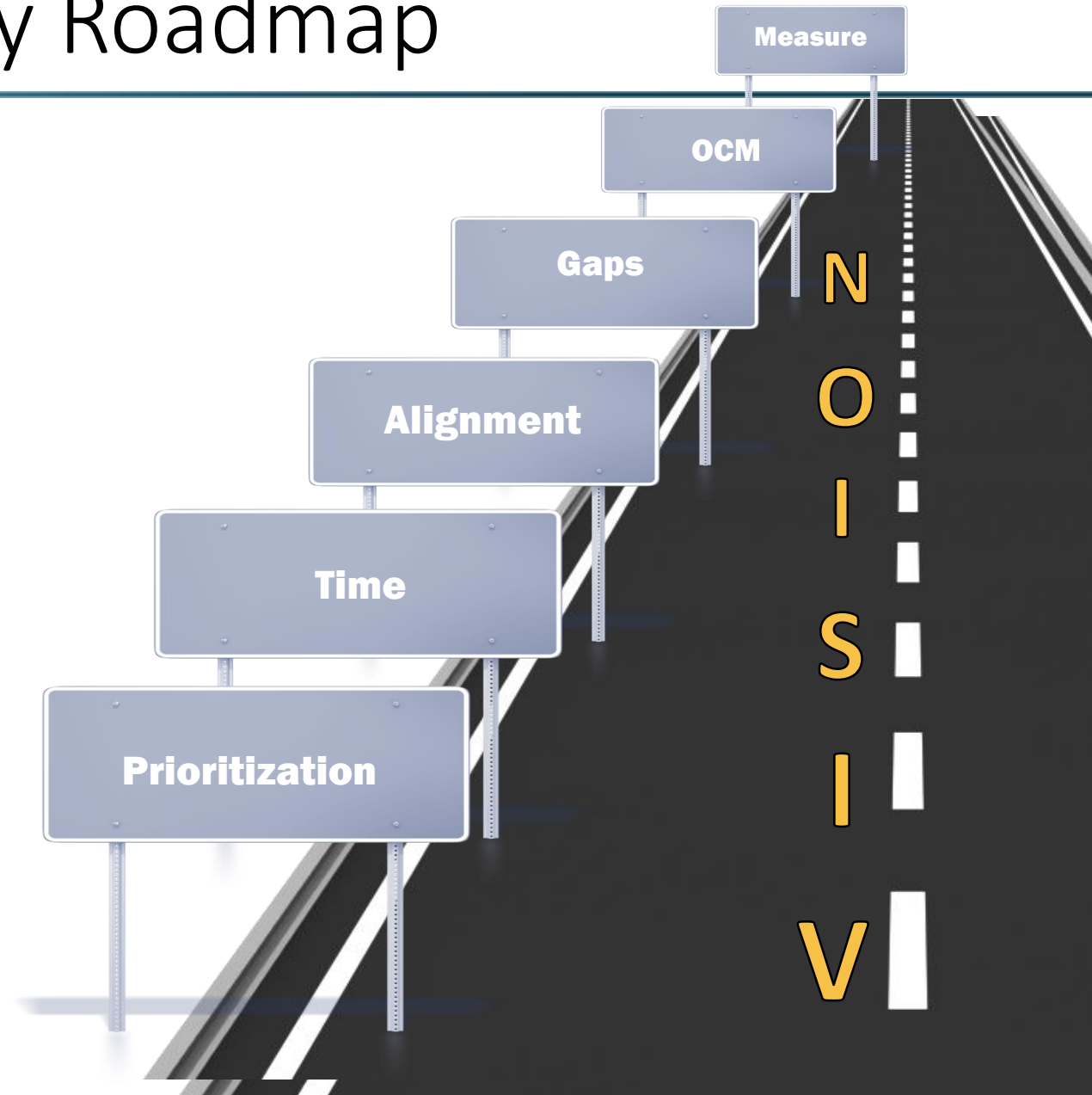
Capability	Maturity	Current Challenges
Resource Allocation and Utilization		<ul style="list-style-type: none"> Item 1 Item 2
Capacity and Demand Planning and Forecasting		
Time Tracking/Approval Policy and Cadence		
Resource Data Integrity Management		
RM Organizational Change Management		
Resource Management Governance		
Resource Requisition Process - Internal		
Resource Requisition Process - External		
Resource Role Management		
Resource Skill Management		
RMO Operating and Support Model		

RMO – Define A Capability Roadmap

Roadmaps help organizations deliver successful enterprise solutions.

A clear roadmap will:

- Execute On A **Vision**
- Force **Prioritization**
- Provide an element of **Time**
- **Align** Business, IT, and PPM Processes
- Reveal **Gaps** in PPM processes and functions
- Drive **Common Understanding** and **Shared Ownership (OCM)**
- Provide the ability to **Measure** success



RMO – Crawl – Walk – Run



- Create Charter for formal RMO
- Initial set of policies and processes
- Analyze data to improve Quality issues
- Standardize Reporting
- Train RMs and PMs



- Initial Enterprise Level Reporting
- Analyze data to improve Compliance issues
- Finalize policies and processes
- Mentor RMs and PMs on leveraging Clarity



- Assist in resolving staffing issues
- Setup continuous improvement cycle with end users
- Expand compliance and integrity monitoring to time tracking

Questions?



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Thank You For Attending regoUniversity

Instructions for PMI credits

- 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 Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



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