

Resource Management Office | Creation And Optimization

Your Guides: Sara Garvey and Grant Zemont

Introductions

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



Agenda

- What Is A Resource Management Office (RMO)?
- RMO Operating Model
- Process And Policies
- Reporting Strategy
- Organizational Change Management (OCM) Strategy
- How Do We Get There?

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 NOW

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**

What Does An RMO Actually Do?

1. Set Resource Capacity and Demand Reporting Structure
2. Define Resource Allocation and Booking Policies
3. Manage the Processes that Measure Vendor Performance
4. Deliver RM Data and Reporting
5. Provide Organizational Change Management around Resource 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. Can own the Project and Portfolio Management (PPM) Tool from a product perspective
5. Supports and mentors project managers

Resource Management Office (RMO)

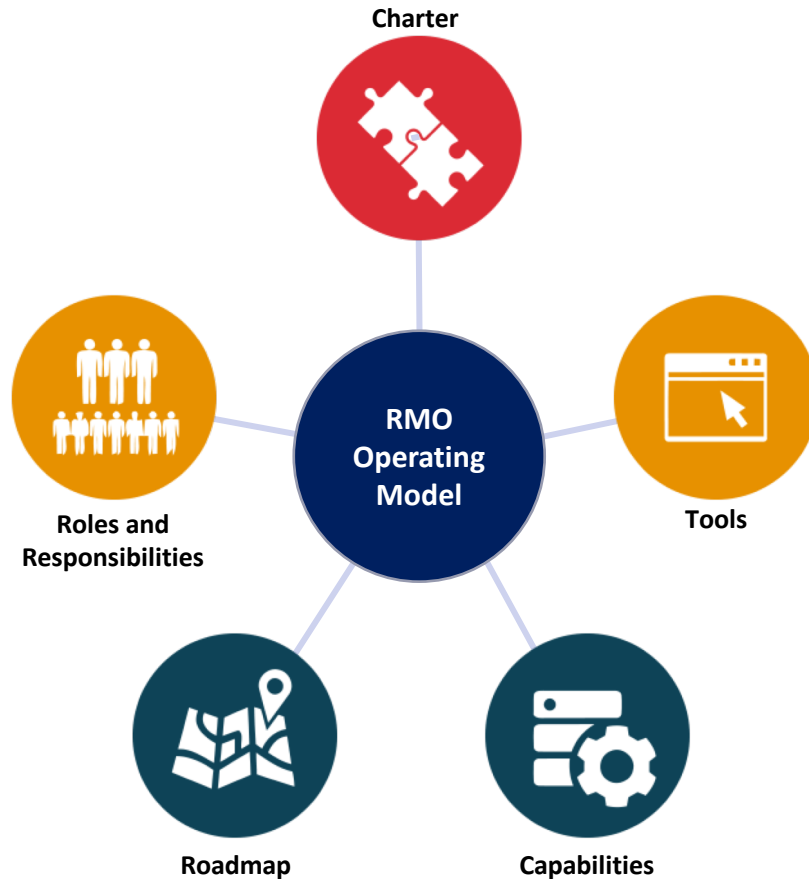
1. Owner of the resource planning and forecasting process
2. Owner of resource data analysis and aggregation - allocation, capacity and demand forecasting, adoption
3. Can own the vendor management/scoring process
4. Can be a centralized resource management/ booking entity
5. Supports and mentors resource managers

RMO Operating Model

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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 in 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. Capabilities

- 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?

A Note on Roles and Responsibilities

Role	Description
RMO Lead	Develop, own, and mature resource management processes, RMO operations, and reporting cadence.
Data Analyst	Pulls standard and ad-hoc data from CA PPM. Analyses data to understand trends, areas of excellence, areas for improvement. Provides Level 2/3 support with data analysis/policy questions.
CA PPM Mentor	Assists with ongoing mentoring and training of CA PPM resource management and project management users. Mentoring activities include 1:1's, workshops, office hours, and ad-hoc training as needed.
Booking Management	Reviews the data and works with resource and project managers to understand the “subjective” side of the issues – sometimes the data lies. Works with upper management to understand portfolio priorities and associated resource impacts.



These roles can be combined or separate depending on the organization

The RMO Over Time



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

Then RM/PMs pick up the bulk of the execution and the RMO does mainly supporting analytics and arbitration for the organization.

Process And Policies

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Process Approach

RMO's own the development and management of **resource planning and forecasting, time entry**, and even **vendor management** process and policies.

Process and Policy Starters

1. What is the process and cadence for resources to be allocated and assigned to work?
2. How far out should resources be allocated, and with what level of accuracy over time?
3. How should resource allocations and assignments be managed as people come and go within the organization?
4. How will the day-to-day process fit into enterprise reporting and resource forecasting cycles?
5. Project work vs. non-project work – what is the approach for allocations?
6. How do we measure vendor onboarding, close out, effectiveness?
7. How do we measure allocations vs. actuals, and at what level?
8. Bottom up - What will be the resource booking review cadence with PMs/RMs?
9. Top down - How will the resource booking review cadence plug into governance mechanisms?
10. How will we approach role and skill utilization?

Reporting Strategy

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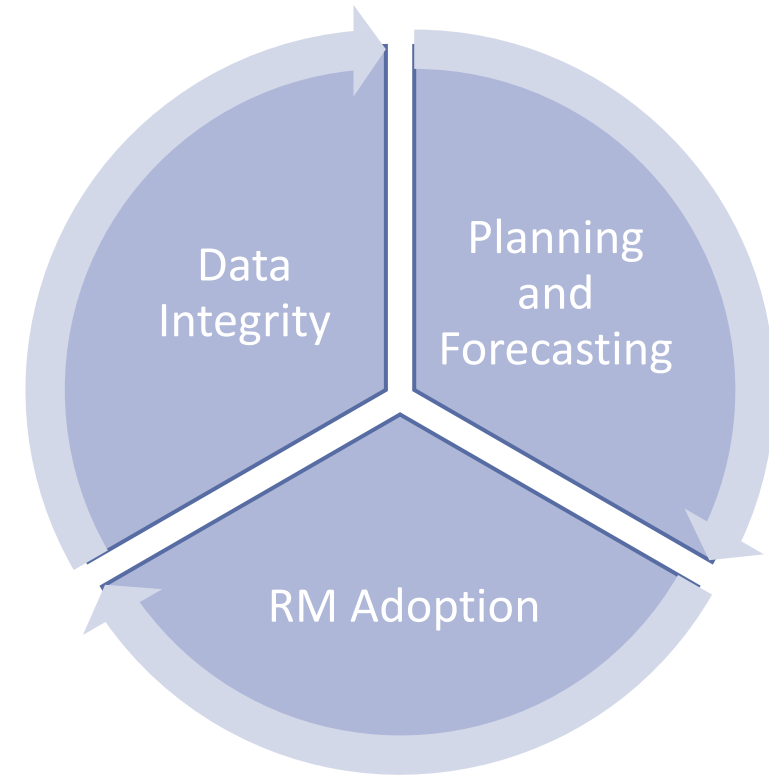
Reporting Approach

RMO's own resource-oriented data **analysis** and **reporting** for the organization. This can be a centralized function, or the RMO can own enterprise reporting, and mentor lower levels of the organization with their reporting needs.

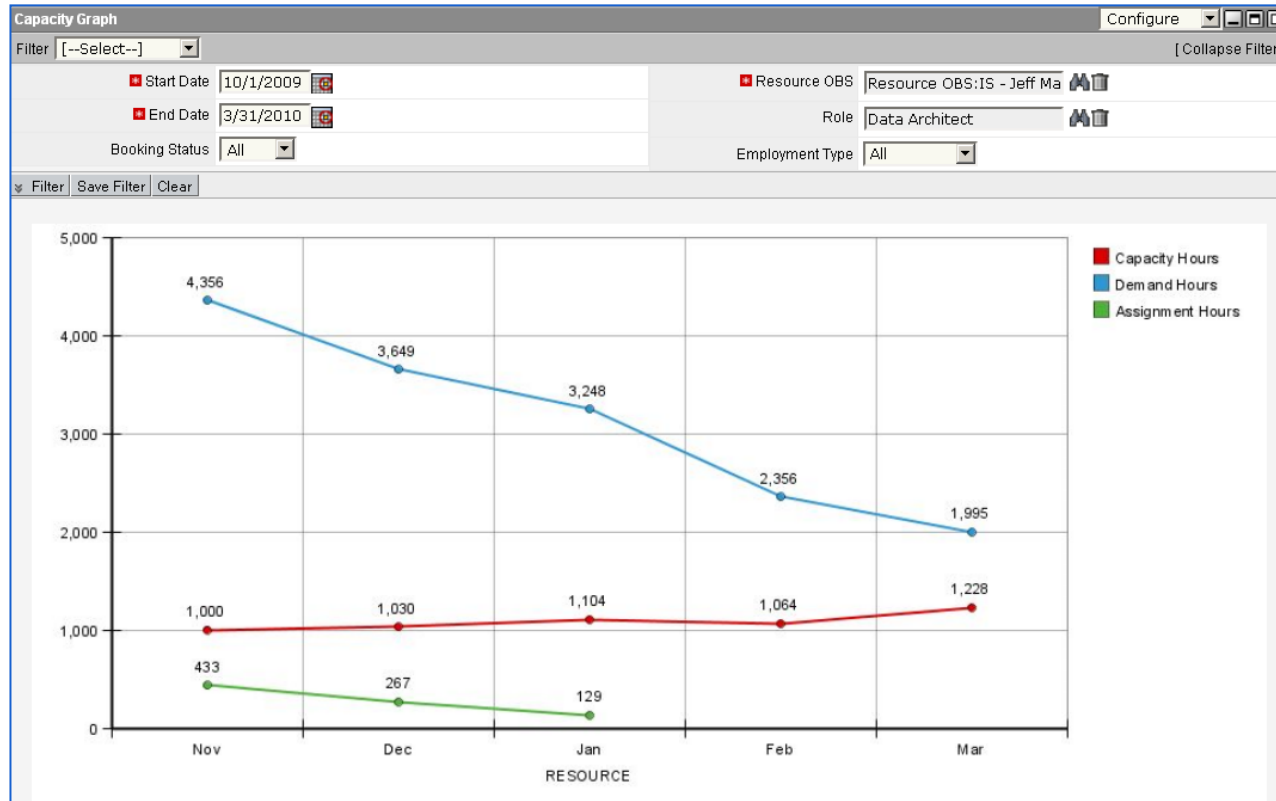
Reporting Strategy

Questions to ask...

- What are we measuring and why?
- Who needs access to which data?
- What decisions will come from the data, both for executives and RMs?
- What do the reports need to reflect?



Portlets



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

Reports

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
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
	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
	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
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
	Demand	738.80	688.00	1,603.24	1,341.80	1,583.40	1,734.80	1,241.20	926.10	904.11	912.81	703.40	1,641.20
	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
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
	Demand	526.40	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	552.00
	Remaining Capacity	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
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
	Demand												
	Remaining Capacity												

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
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
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
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
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	-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	260.10
Childers, Valerie	Architect	0.00	0.00	0.00	-113.00	-56.00	-17.00	0.00	0.00	0.00	158.40	151.20	115.60
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	-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
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	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
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
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	-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
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	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	-326.00
Patel, Sarjay	Developer	0.00	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	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
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
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
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	-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
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	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	-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
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
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	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
Grand Total		25.60	-11.00	114.00	124.09	-438.39	-480.30	-479.68	-524.90	-331.60	-1.48	-93.01	63.40

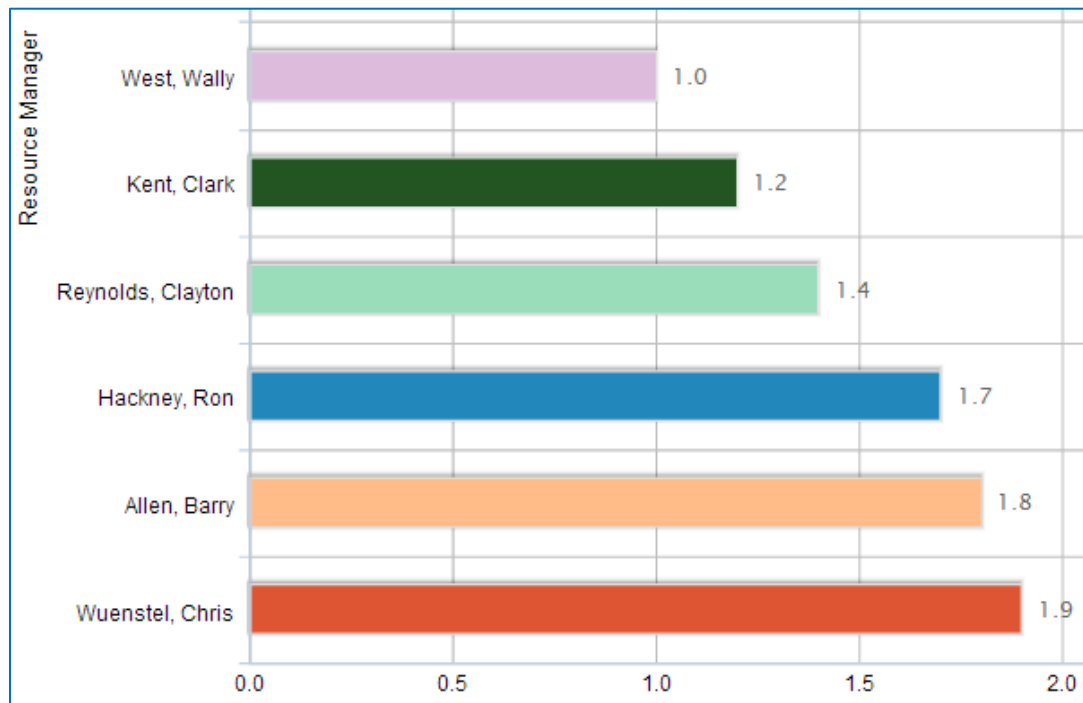
Good Places to Start:

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

Black = OOTB
Blue = Rego Exchange

Resource Manager Adoption

Goal: ensure resource managers are successfully using CA PPM to manage resource needs within their teams and departments



Good Places to Start:

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

Black = OOTB
Blue = Rego Exchange

Organizational Change Management

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OCM Approach

RMO's own the **organizational change management** aspects of implementing enterprise resource management. This includes planning, training, and ongoing support.

Goal of Change Management

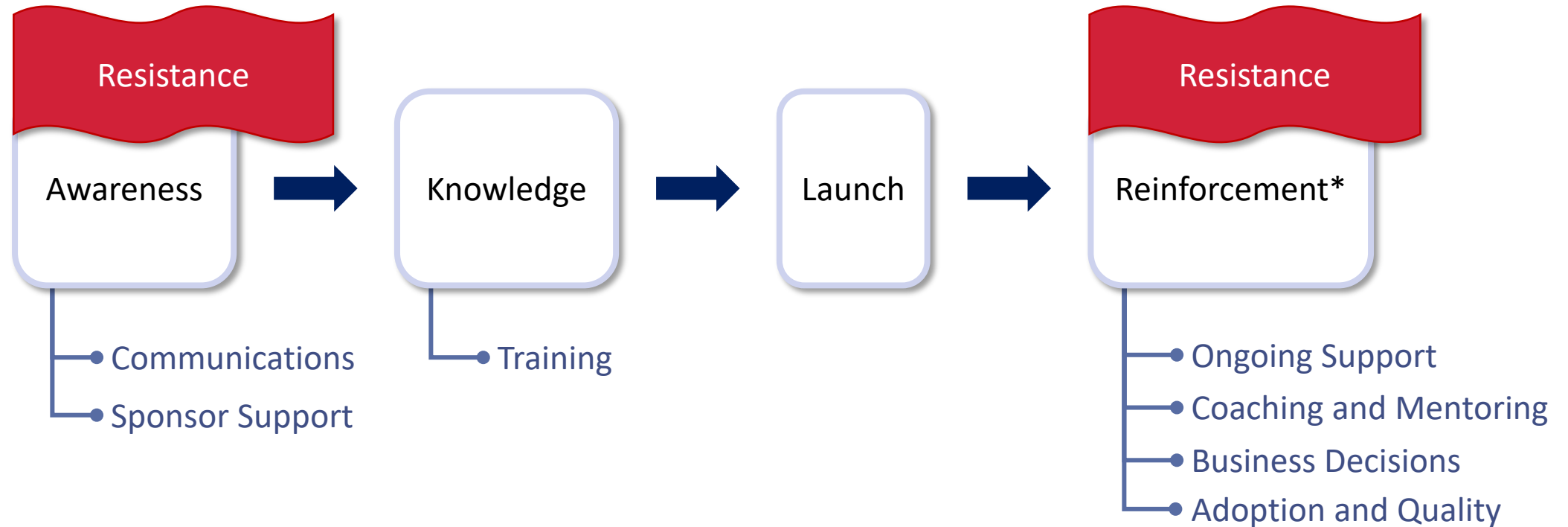
To enable **individuals** to adopt new values, skills, and behaviors so that business results can be achieved for the organization as a whole.

It is fundamentally about **people**.*

Therefore, a framework must be put in place to **prepare the organization** for change, **manage resistance**, and continually **support the organization** through launch and beyond.

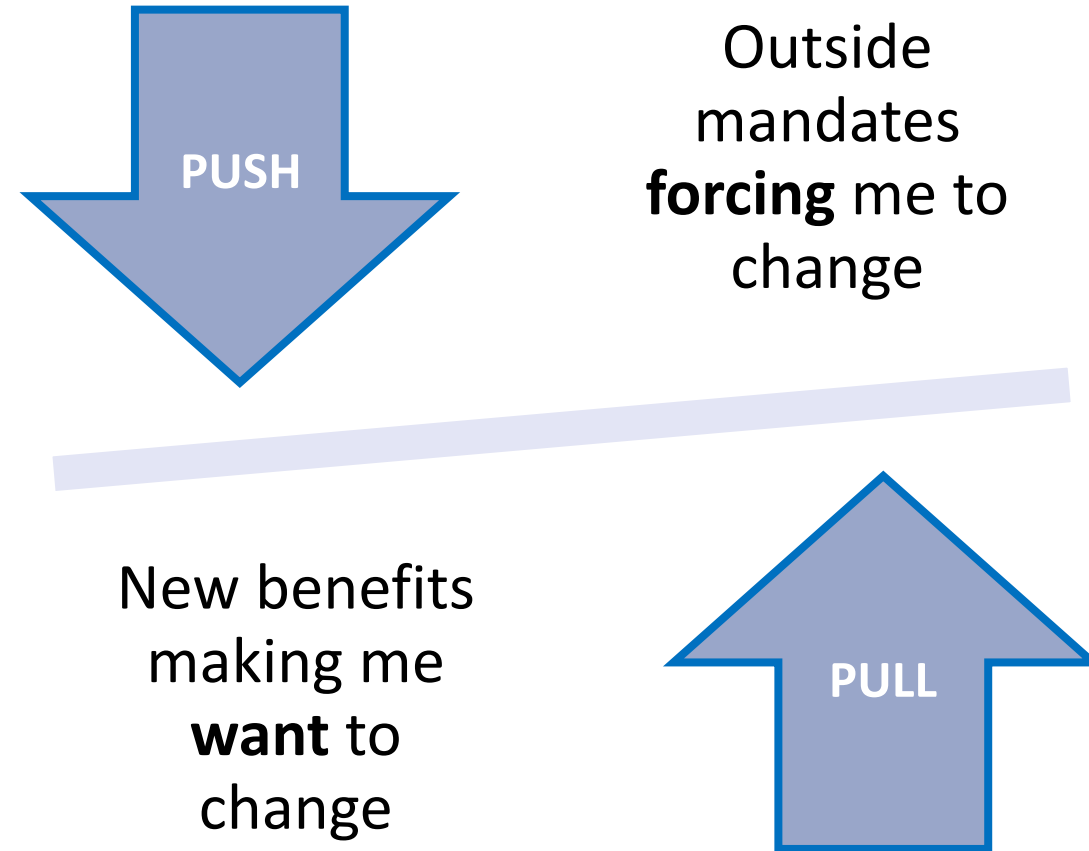
* Change Management, Hiatt and Creasey

PPM Org Change Management Steps



* See Appendix for more info

Balance of Push and Pull



Push

Common Points of Resistance

- Another mandate from above
- More work for me and I'm already busy

Ideas to Reduce Resistance

- Outline decisions that will be made from CA PPM on the executive level and how their effort inside CA PPM helps
- Show the data being used and decisions being made (transparency)
- Lowest possible impact to Resource Manager's daily life

Pull

Common Points of Resistance

- The tool is too difficult to use
- If I have to do something more or something different, what's in it for me?

Ideas to Reduce Resistance

- Beyond functional training, show how the tool makes my job better (quality)
- Beyond functional training, show how the tool makes me do my job faster/ easier (efficiency)
- Establish a **Core Team** for each area affected by the RMO - listen to your end users on what's working, what's not, and address those issues! Core Teams are main inputs into the CA PPM Product Backlog.

**In the long term, PULL is more powerful than PUSH
PUSH without PULL = recipe for low to no adoption**

Vendor And Contract Management

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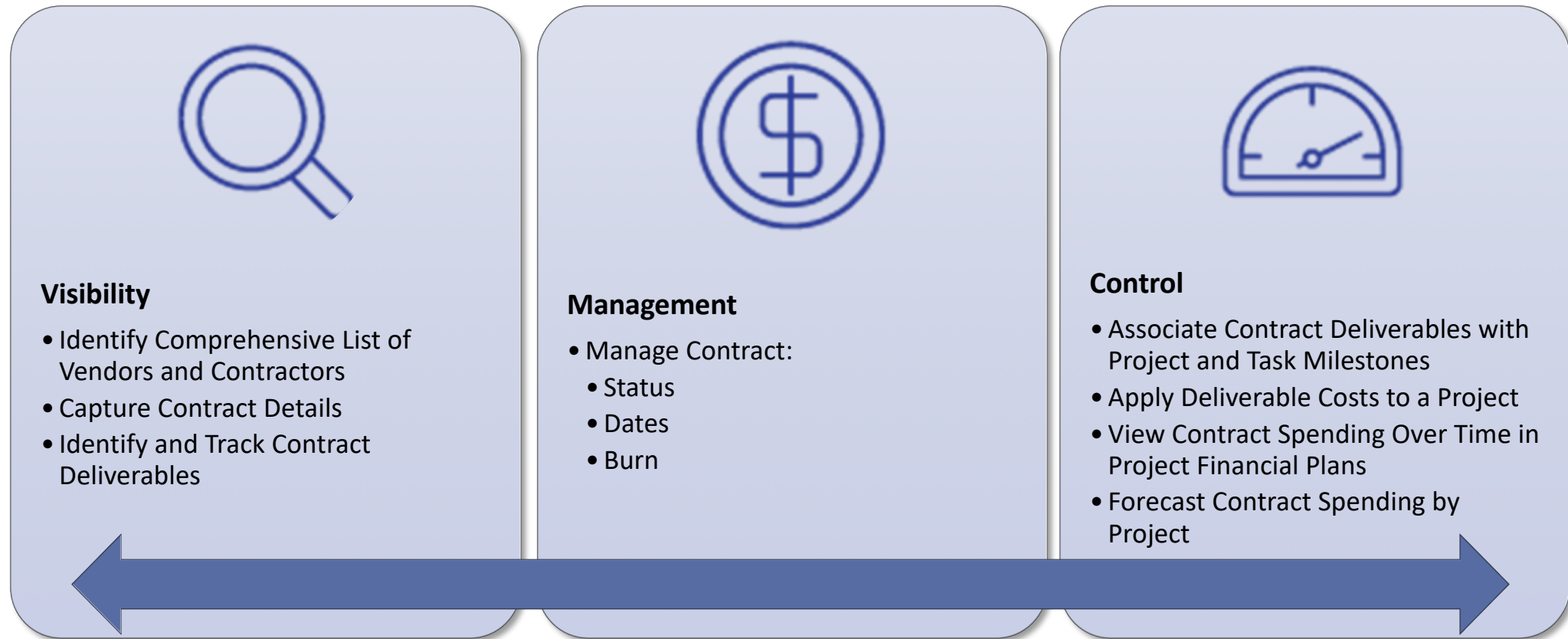
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Vendor Management Approach

RMO's can own vendor and contract management, vendor onboarding and contract closeout, and vendor performance reporting on projects, or for the entire enterprise

Defining Contract and Vendor Management

What is Contract Management in the context of CA PPM?



For More Information...



<https://regoconsulting.com/manage-contract-deliverables-costs-and-milestones-with-ca-ppm>

How Do We Get There?

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Assess Where You Are

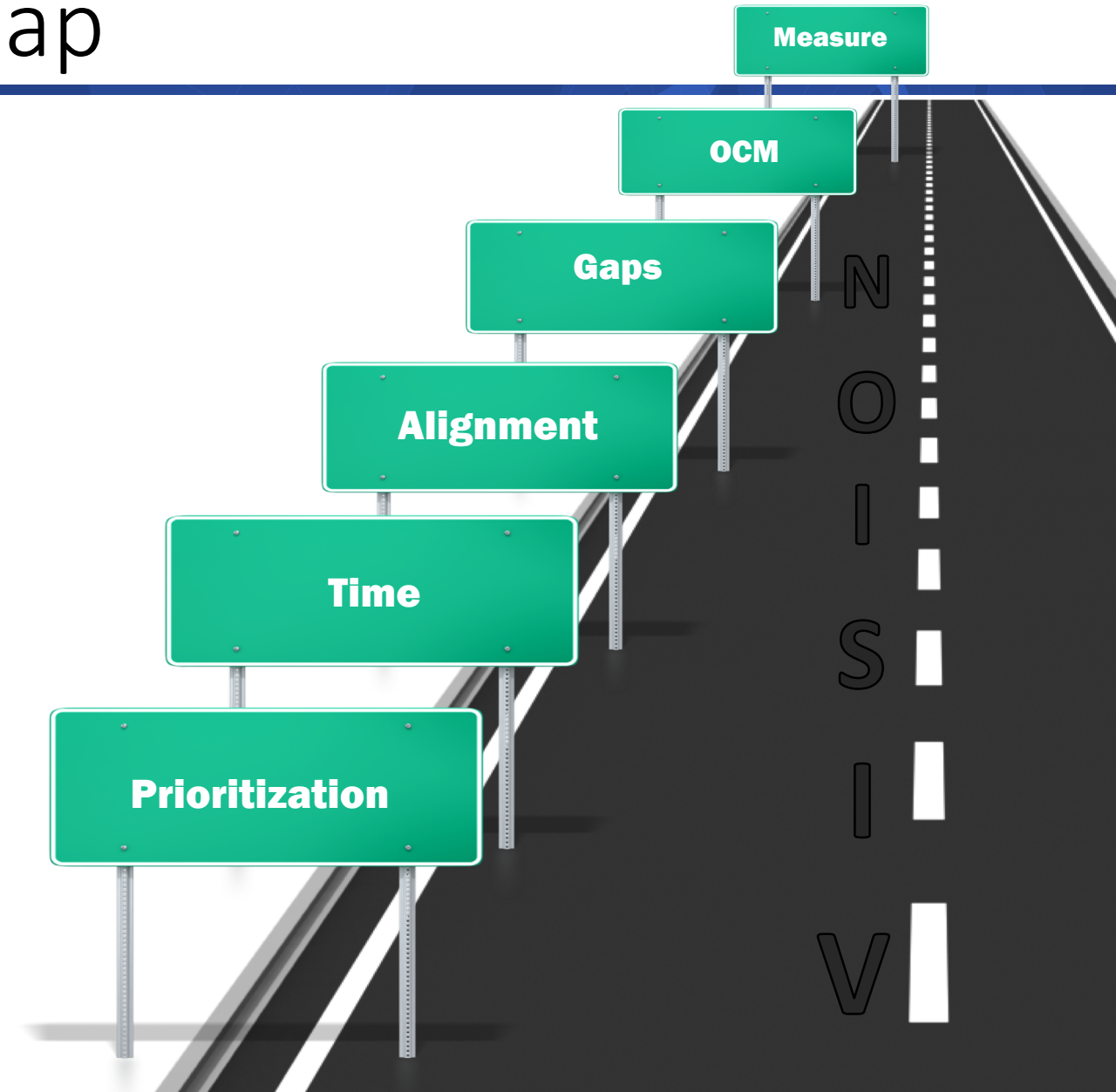
Capability	Maturity	Current Challenges
Resource Allocation and Utilization		<ul style="list-style-type: none"> Item 1 Item 2
Capacity and Demand Planning and Forecasting		
Time Tracking/Approval Policy and Cadence		
Resource Data Integrity Management		
RM Organizational Change Management		
Resource Management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

Define A Strategic 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



Crawl – Walk - Run



- Initial set of portlets and processes
- Analyze data to improve compliance issues
- Train RMs (and PMs)
- Create Framework for formal RMO



- Formalize RMO – roles and responsibilities
- Analyze data to improve integrity issues
- Finalize portlets and processes
- Mentor RMs (and PMs) on leveraging CA PPM



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

Questions?



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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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Appendix A

OCM Tools for Reinforcement

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Tools for Reinforcement (1)

Ongoing Training - Monthly

- New Hires: Set the tone, proper formal training
- Existing Staff: topical reinforcement (e.g. RM Training)
- Reinforce Awareness messages around WHY and VALUE

Coaching and Mentoring

- Lunch 'n' Learns
 - Mini topical reinforcement (e.g. how to configure a portlet)
- Mentoring
 - **Contextual** support via office hours or desk drive-by's
- Office Hours
 - **Contextual** learning – bring your real-world questions to work through

Tools for Reinforcement (2)

Business Decisions

- Portlets and Reports: show what executives see and use
- Portlets and Reports: show what end users can use to make business decisions

Adoption and Performance

- Adoption reporting
- Data quality reporting