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Resource Management | Best Practices

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Introductions

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

Open Mic

- The goal of identifying and implementing best practices is to have a successful resource management implementation. What do you think success looks like?

- What Prevents Success?

- For those that have a successful implementation of resource management – what are some of your best practices?

Some Rego Thoughts…

What is Success

- Complete data
- Accurate data
- Fewer schedule delays waiting for resources
- Proper prioritization and pacing of new projects
- Identify and escalate resource risks to delivery

Stumbling Blocks

- Difficulty updating allocations
- Finding the right level of granularity
- Bi-Model (not true agile)
- Reporting goldilocks – nothing just right
- Effective communication between Resource, RM, PM
- Complexity, inconsistent process

Format of This Session

- In the next set of slides, Rego has compiled a set of best practice points related to functionality.
- It may seem choppy, because it is.
- Each slide is a different best practice point, so there is not a "flow" between slides in many cases.

Some Rego Best Practices

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Implementation Best Practices

- 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.
- If you’ve never done something like resource management which takes a bit of coordination and consistency across many groups and functions, it would be best to take a crawl, walk, run approach—start simple and then build it out further only if it makes sense.
- Resource management is more about building effective processes; for example, assume you are able to get the best data and most precise information from the tool, what mechanisms, processes, roles and responsibilities are in place to act on that information?

Availability Best Practices

- When possible, use the CA PPM Calendars
  - Automatic Updating of resource availability
  - Removes all allocations for the specified periods
  - Can be used to drive communications within CA PPM to the Project and Resource Managers
  - Zero-capacity calendar can be used to ensure “management” resources don’t skew working capacity counts.
- 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)
- Ensure capacity is aligned with Primary Role, Employment Type, and Resource OBS. But keep those elements to a manageable set of values / complexity (e.g., no more than 25 roles, 4 levels in the OBS).
- Maintain Date of Hire and Date of Termination. For contractors, introduce a Contract End Date as well.

Allocation Best Practices

- Manage allocations by the month. Try to avoid setting default allocation or allocation segments any less than 10%.
- Adjust expectations of accuracy and granularity based time horizon (e.g., 100% allocated for next 4 weeks, +/- 10% for 4-8 weeks, +/- 20% for 8-12 weeks).
- Set filters to show where "issues" occur
  - Typical variance of allocation is +/- 25%
- Use hours or % Availability as the Work Effort Unit of Measurement in organizations that have multiple availabilities for resources
  - FTE and Days use the Base Calendar default of 8 hrs to convert from hours
- Compare Allocation against the prior two months of Actuals.
- RM managers should schedule staffing meetings to review and update allocations with staff.

Assignment Best Practices

- Choose allocations or assignments – not both. If using ETC – then run job to sync allocations to assignments. IF using ETC – remove allocations from views – manage ETCs.
- 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 pilling 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.

Reporting Best Practices

- The OOTB views a enough to manage resources – resource workloads, weekly detail, new UI for staffing. However, often 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
- Some sample views we have seen successful are:
  - Project Manager and Resource Managers should compare Actuals (typically the last 4 weeks) against the Allocations to determine if future resource commitments should be adjusted
  - Rego Adoption Metrics for data compliance (RYG or # score on a resource to know if there is an issue)
  - Pie or bar chart showing where there is an issue with a drill to the data
- Define your own dashboard that reorganizes the OOTB Resource Planning portlets based on the “day in a life” activities of a Resource Manager.

Notification Best Practices

- Use notifications for specific actions needed, you do not want to over communicate.
- Emails will provide direct links into CA PPM for an action.
- Some popular notifications
  - Allocations to individual resources – if this incorrect talk to a manager
  - Exceptions (over/under allocation) to booking manager
  - Schedule key reports (e.g., Over/Under Allocation by Resource) to be delivered via email to RMs and division managers

Data Maintenance Best Practices

- Ensure you have solid notifications and reporting – this will help take the "noise" out of end user complaints. You have given them easy ways to see and links to correct data.
- Some alternative ways to allow users to update data
  - ITD Editors
  - ITROI Excel editing
  - Custom excel updates
  - Custom allocation spreading up front based on cyclical need by role
- Foster positive competition with a Compliance dashboard.

Questions?

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