Power UP

Effectively Managing Resources Across Teams

August 30, 2023

Thanks to Our Sponsors:

Agenda

01 Introduction

02 Effectively Managing Resources Across Teams

03 RMI Updates

04 Audience Q&A

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www.resourcemanagementinstitute.com

Meet the Presenters

Nick Cochran

Director

RMI

Christine Thomas

Managing Director, Talent Alignment

FORVIS

RMI Perspective

Best Practice Summary

01 — Use a **centralized approach to RM** with transparent visibility enterprise-wide to all available resources

02 — Benchmark operational efficiency **using 2080 for your utilization denominator**. Adjust for different work situations e.g. type of work, vacation standards, etc. by adjusting your targets

03 — Implement a **documented RM process** with supporting training

04 — Focus **on metrics that matter** – Project performance, utilization, customer and employee retention/satisfaction

05 — Build and operate a **Resource Management Office (RMO)** to manage RM for your enterprise

06 — **Invest in your Resource Managers** – training and career paths

07 — Let your process requirements drive a **use-case driven selection process for automation tools**. Process design should precede PSA/PPM tool selection

08 — **A properly designed skills database and process** will include defining skills by role, implementing regular updates by employees, and conducting proper validation of employee data by management or SMEs
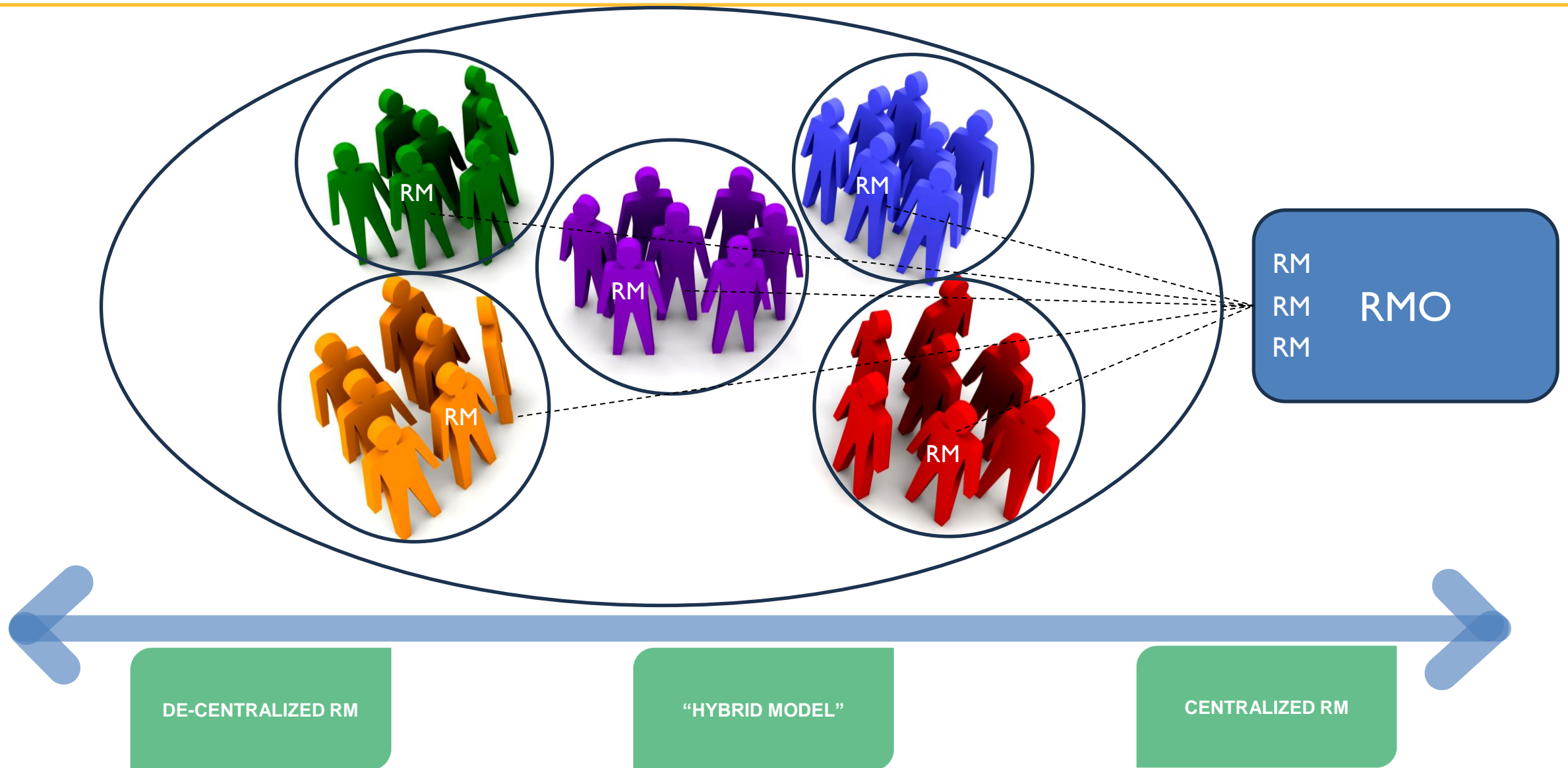
09 — Leading delivery organizations have a **robust capability for capacity planning/forecasting** to meet the dynamic needs of the business

10 — Processes should be developed to **better balance priorities for project allocations** between the need for business efficiency (utilization) **with organizational objectives for employee engagement and retention**
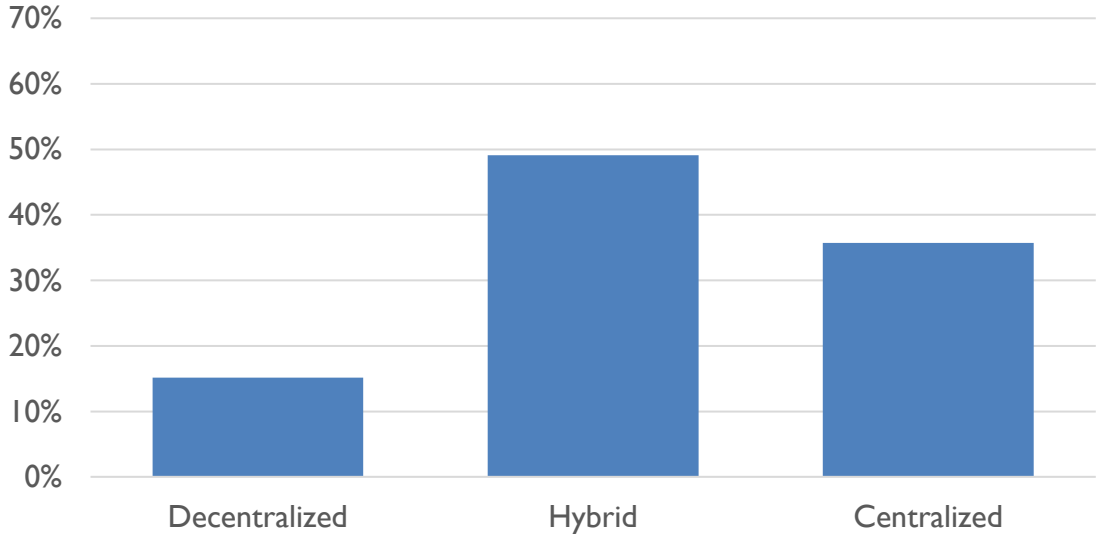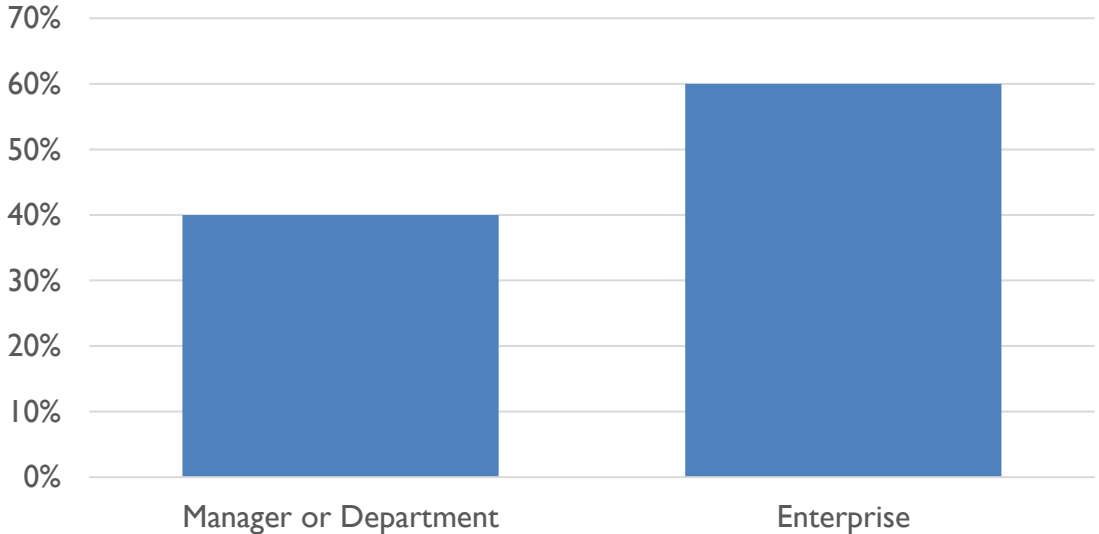
What is Centralized RM?

DE-CENTRALIZED RM

"HYBRID MODEL"

CENTRALIZED RM

RMO

RMI Data

What resource management model does your organization currently have in place?

Model	Percentage
Decentralized	~15%
Hybrid	~49%
Centralized	~36%

Delivery resources in your organization are considered assets of:

	Percentage
Manager or Department	~40%
Enterprise	~60%

Source: RMI Market Research – RMO Organizations Survey Q1 2023

RMI Recommended Approach

Resources should be viewed as assets to the organization and area of need, not just their manager or department.

Effectively Managing Resources Across Teams

Balancing Act

- The role of resource management is especially important when working across teams.

- Dedicated resource management should be handled by someone who has visibility above the varied priorities and activities of different teams.
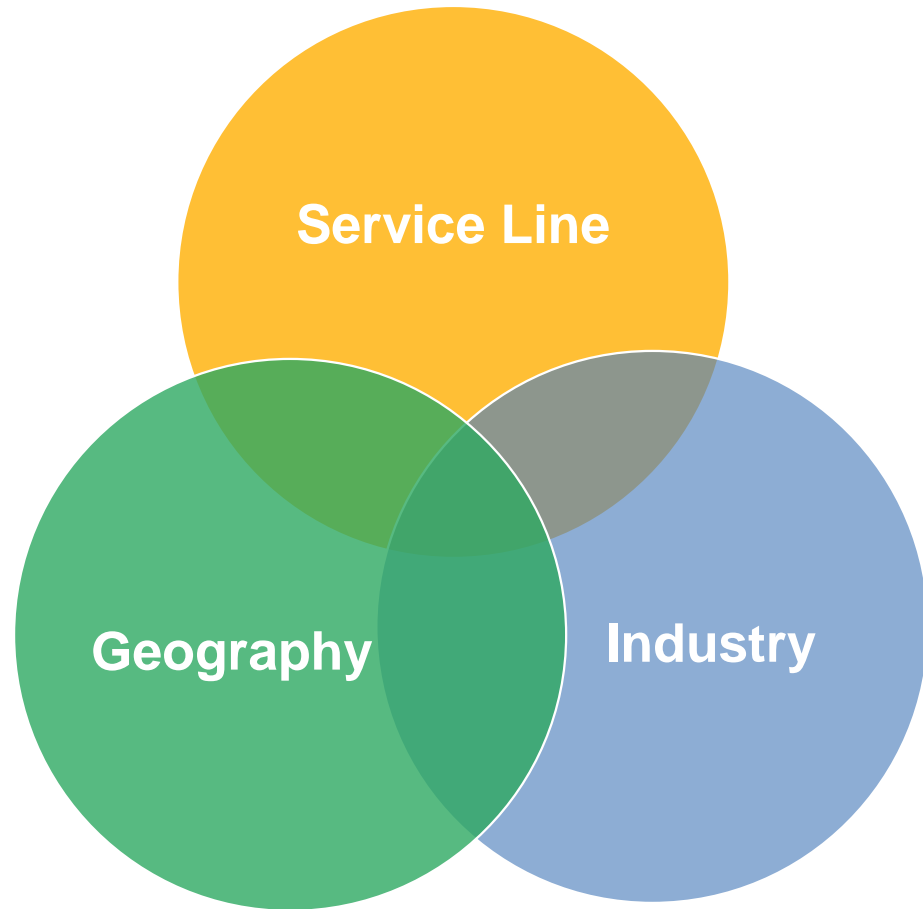
Reducing the Risks

01 Launch well to establish trust and familiarity

02 Map Skills

03 Manage time across teams

04 Create a learning environment

Tips for Sharing Across Diverse Teams

01 Invest in technology

02 Embrace different ways of working across your organization

03 Create a contingency plan

04 Utilize capacity planning

Establish Your "Rules" & Prioritizations

Service Line

Geography

Industry

Staff Development
Needs & Preferences

Top benefits of Cross-team Resource Management

- Avoid unforeseen bumps in the road

  - Help prevent team burnout

  - Foster efficiency over time

Upcoming Events and Training

Third Annual Virtual RMI Connect Event

October 3 and 5, 2023

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https://resourcemanagementinstitute.com/rmi-connect/

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Q&A

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