



Power UP

Take the Guesswork Out of Capacity Planning: Best Practices in Forecasting and Capacity Planning

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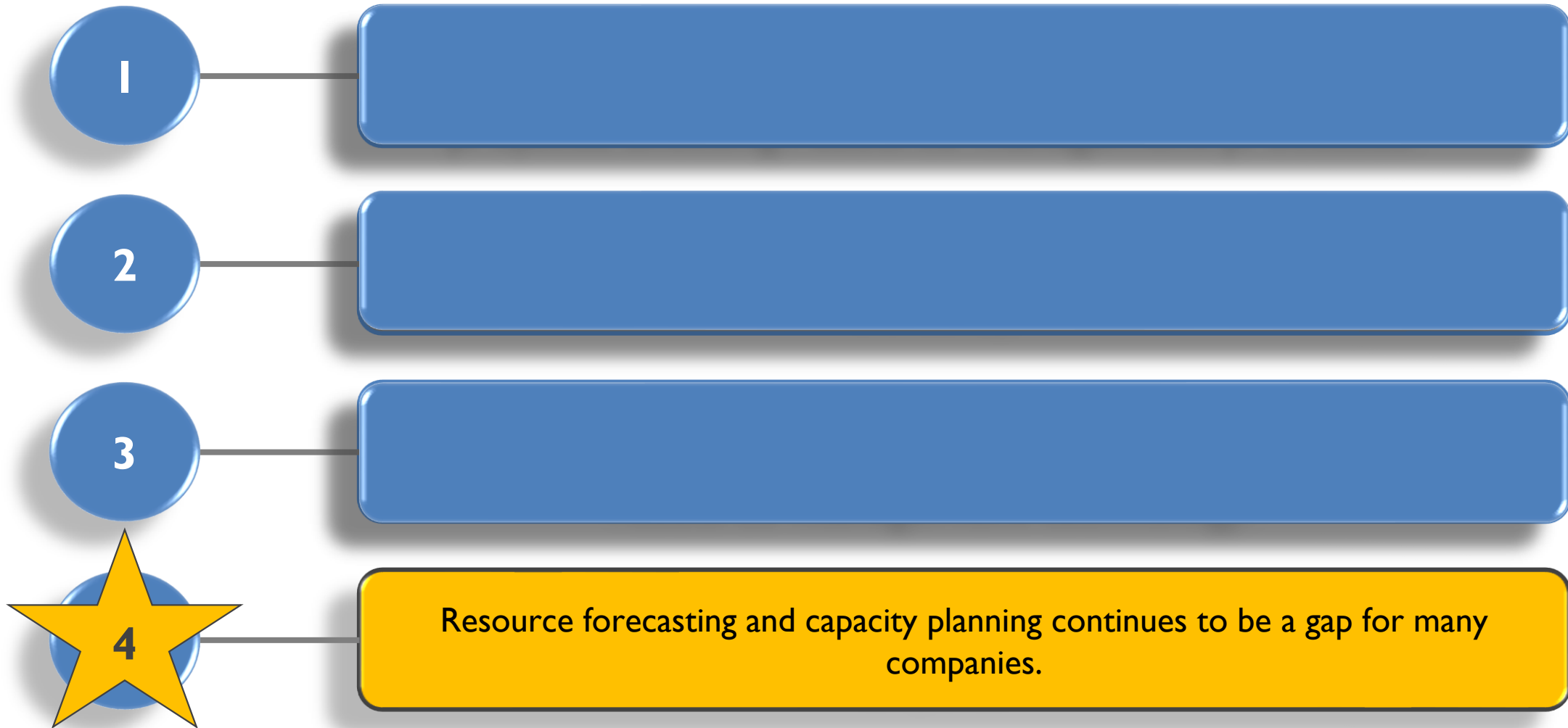
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2 Educate

Best Practices in Forecasting and Capacity Planning

Flashback: State of RM 2017 – Key Trends



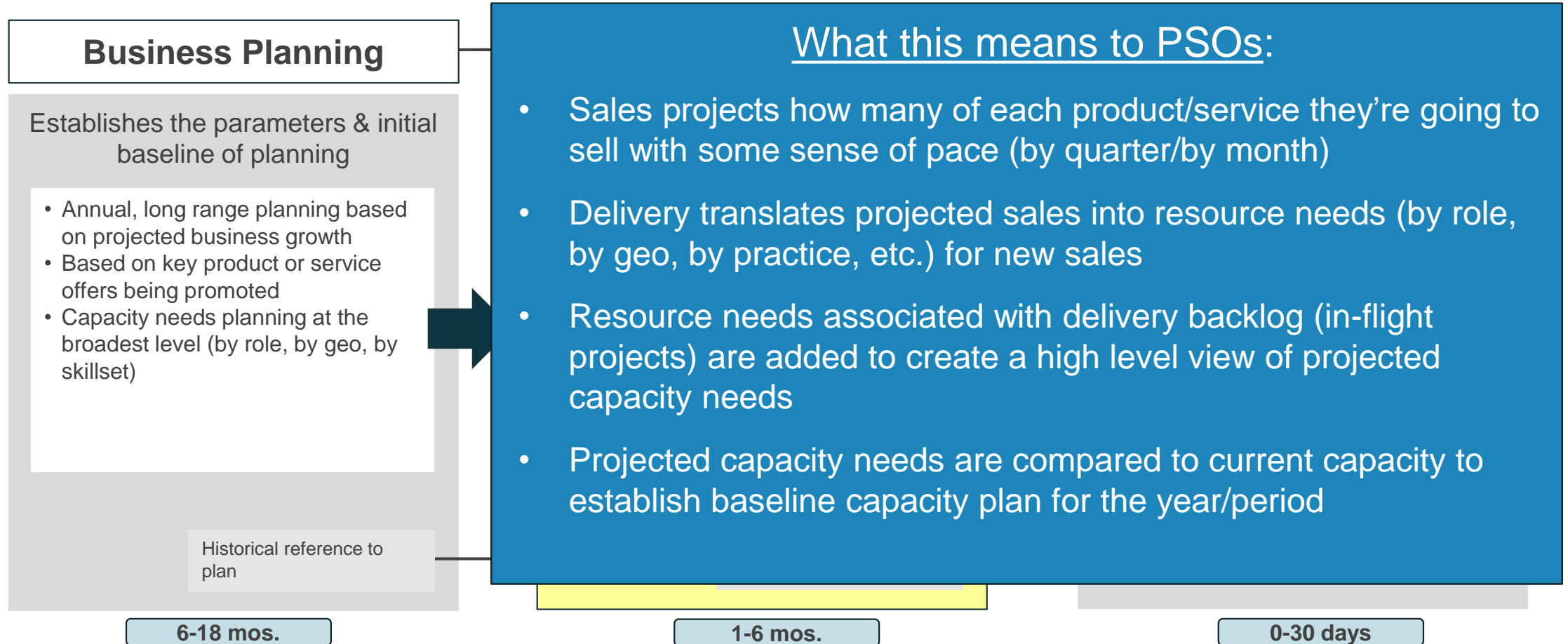
3rd Year in a Row

Challenges We Hear with Resource Planning

- “It’s difficult to get reliable insight on opportunities/potential projects from Sales/Business team”
- “We get a pipeline report from Sales/Business team, but it doesn’t tell me what resources are needed”
- “The pipeline doesn’t include possible extensions to existing, in-flight engagements”
- “It’s difficult to keep our staffing plan up-to-date with changes to in-flight projects”
- More...

Resource Demand Planning

Leading delivery organizations have a **three part approach** to capacity planning to meet the dynamic needs of the business.

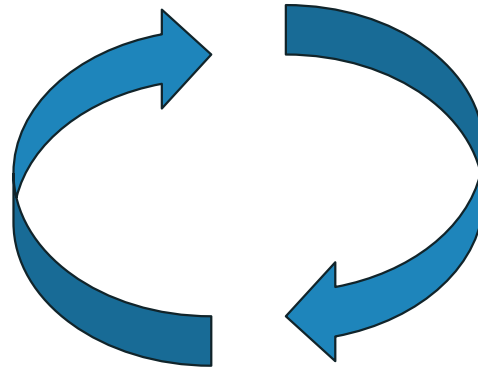


Resource Forecasting

Resource Forecasting improves an organization's ability to proactively meet the needs of its future demand, ensure effective utilization of teams, and have a positive impact on delivering projects on time and on budget

Demand Forecast

Defines demand by client, project, and resource type over the next 30 to 180 days (for all sources of demand)



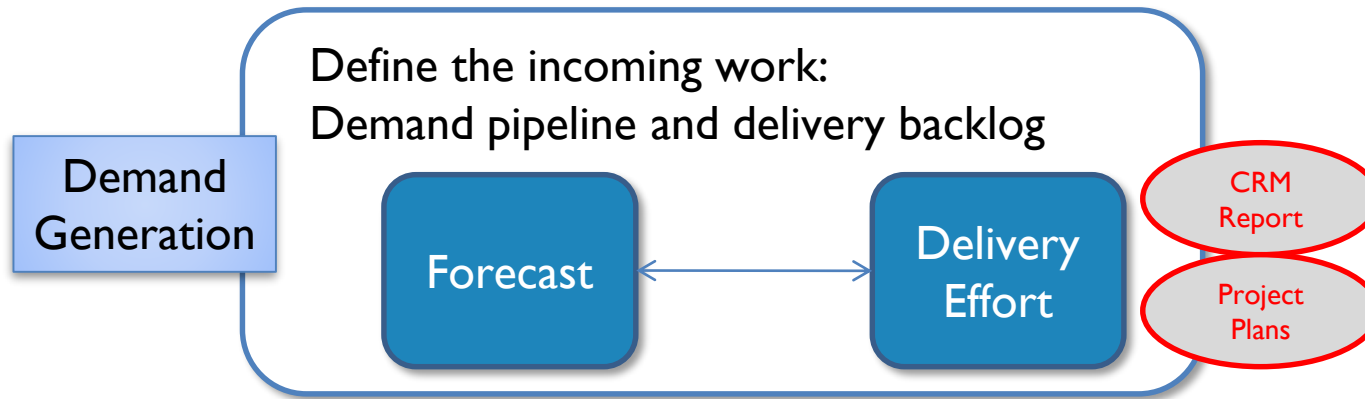
Supports the definition of actions necessary to prepare available resources to meet the needs of forecast demand

Supply Forecast

Identifies sources of available (or to-be available) resources within the existing resource pool(s)

As with any forecasting system – the focus is on the future

Managing Demand

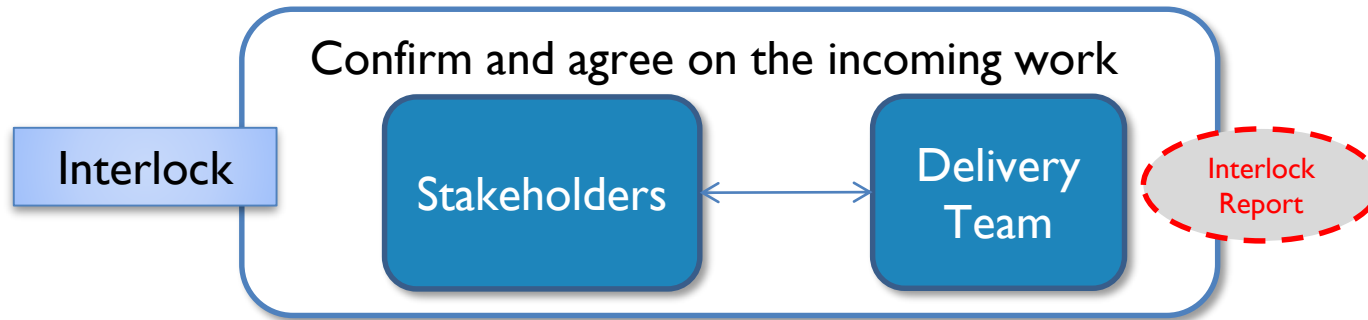


- Identify all sources of demand – all active and future work
- Establish a set of standards to trigger when to initiate resource planning activities based on time and pipeline/approval state
- Create a common format for demand reporting and resource requests
- Opportunities should be decomposed into project plans with resource roles, dates, and allocation
- Delivery manages and communicates updates to ongoing in-flight projects and backlog

Keys:

- Helps to eliminate incoming requests from “unknown groups” asking for unfamiliar roles and/or skill-sets.
- Helps to determine what opportunities/potential projects should be tracked and acted upon for RM.
- Creates a common understanding of what’s needed to be effective and forces thought regarding upcoming work.
- Sets up the ability to overlay demand against capacity and establish capacity plans.

“Interlock”



Forecast Interlock is the process by which related stakeholders agree on all the drivers of demand, future capacity and the “interlock” or overlap between the two.

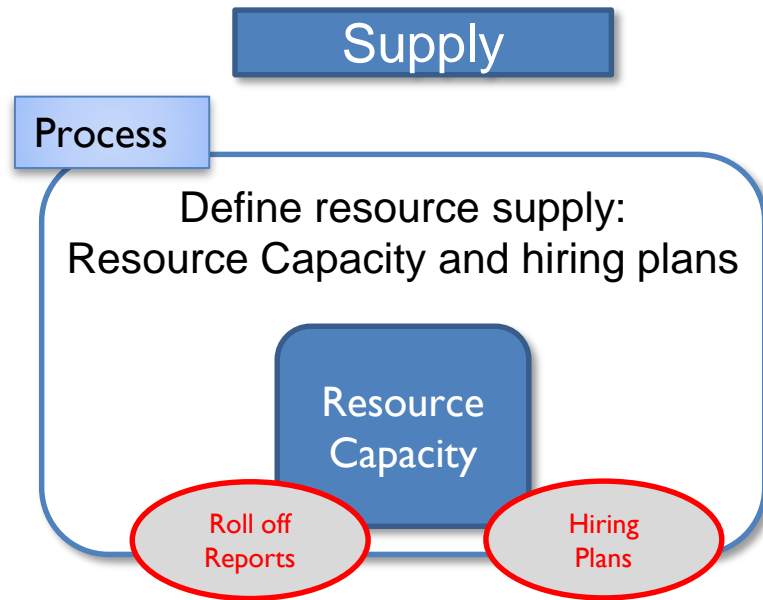
- Sales/Business Team and Delivery agree on the timing and status of all relevant opportunities/potential projects
- Within Delivery, all parties agree with the current backlog of projects and the timeframes and resource requirements to deliver
- Within Delivery, projects agree to current staffing and planned roll off
- Within Delivery, leadership agrees to planned hiring levels

Interlock occurs at multiple levels/dimensions as appropriate to your organization

Keys:

- Effective forecasting must use data that is reliable and accurate. Avoid “Shadow Forecasts.”
- Establish and leverage “Interlock” checkpoints/control points to verify, adjust, and collaborate on demand data.
- Critical to identify the right participants and cadence to validate all sources of demand as well as supply.
- Establish standard reporting to support the interlock framework.

Managing Supply



Identify sources of available (or to-be available) resources within the existing resource pool(s):

- Validate roll off dates from existing projects
- Monitor in-flight projects for possible extensions or addendums
- Incorporate planned new hires

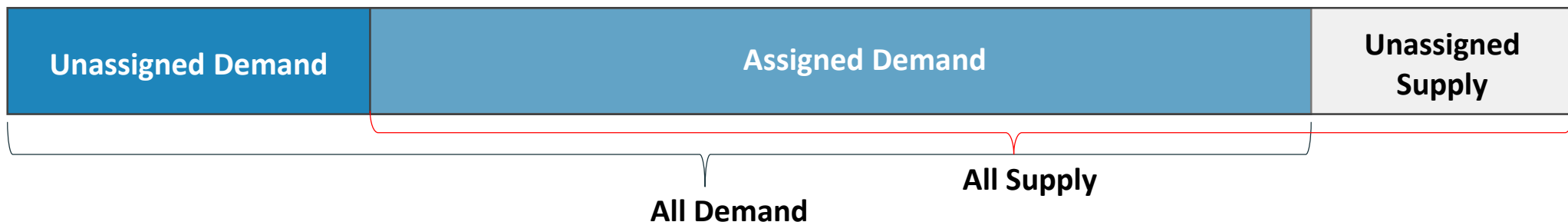
Keys:

- Data should be kept updated as client/project needs change, timing changes, etc.
- Helps to identify where future capacity is expected in the resource pool.
- Being in tune with hiring plans informs when additional capacity will be infused into the resource pool.
- Sets up the ability to overlay demand against supply and establish capacity plans.

Capacity Planning

Capacity Planning is the concept of managing the Supply and Demand of the business.

- **Demand** is comprised of active and future work.
- **Supply** is the resources in their different roles available to work the demand.
- Assignment of Supply (resources) to Demand (project roles) informs how well aligned Supply is with Demand.
 - Do we have enough resources to cover future demand?
 - Do we have resources with the right skills to cover future demand?
- Supports the definition of actions necessary to prepare resources to meet the needs of forecast demand



Conclusion

- Forecasting is the difference between being proactive and reactive in resource management
- Identify the drivers of demand in your organization and involve key stakeholders in the process
- Establish a cycle to keep the data up-to-date as it changes and validate it
- Use confirmed data to help take the guesswork out of capacity planning

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