



Power UP

Getting the Forecast Right:

Best Practices in Accurate Forecasting for Delivery Resources and Utilization

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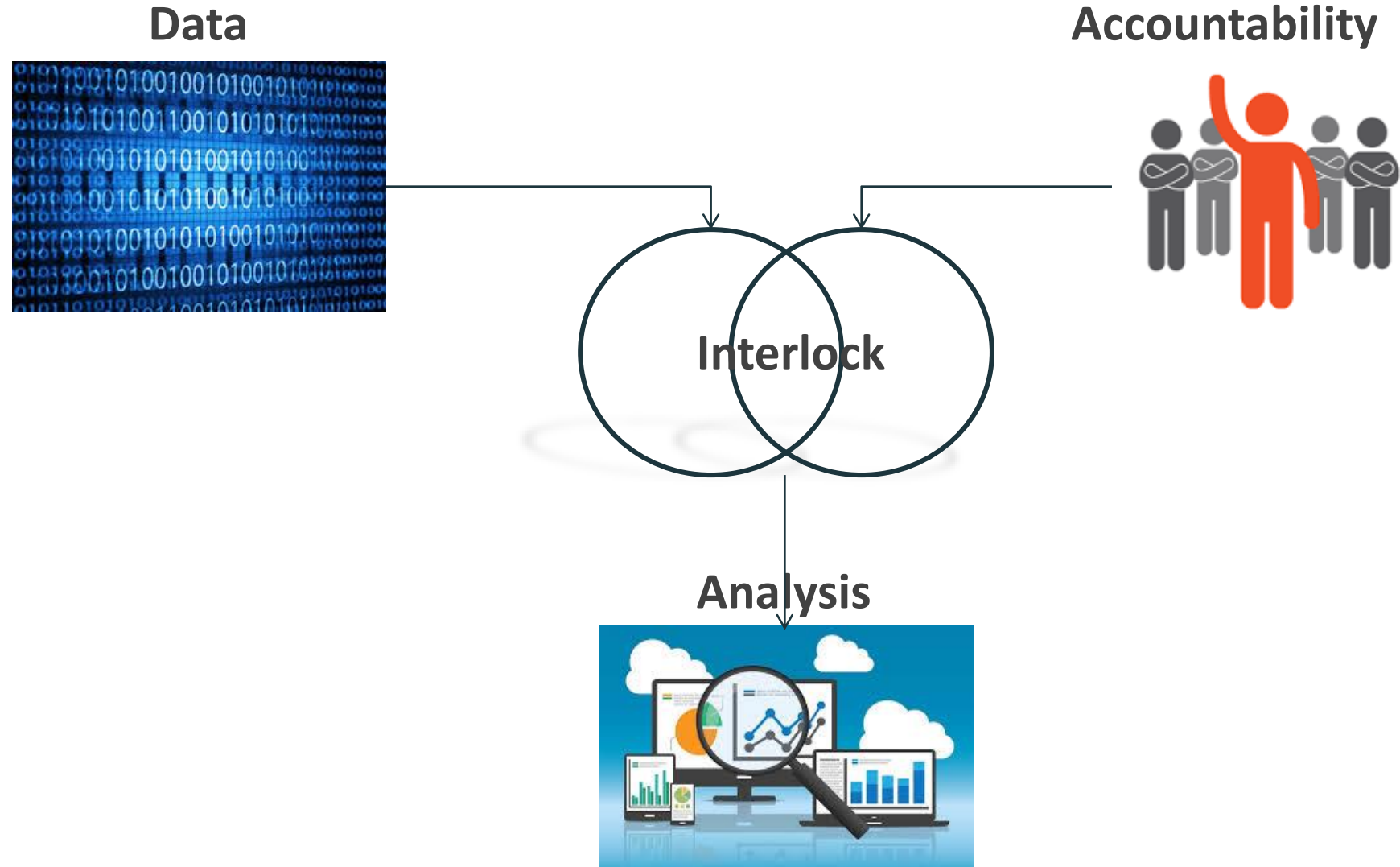
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Getting the Forecast Right

Critical Elements of Forecasting



Data

Myth: The demand (CRM) data quality is bad and will always be that way, so I cannot do proper forecasting

**Pipeline of Potential
Delivery Work**
(Opportunities or Strategic
Planning)

**Backlog typically comprises
80%+ of the total demand
capacity of your forecast**

**Backlog of Authorized
Delivery Work**
(Projects)

- The biggest issue with Demand data is that it is often not in a format that helps to form a Resource Plan.
- The key to managing the Demand data is to define **WHO** should define the resource requirements, **HOW** will they do it, and **WHEN** will they inform RMO for action.
- Management of active delivery is about PMs and Delivery Leads keeping their plans and resource needs up to date
- There is a correlation between well managed project plans and good resource planning

Accountability

A story of “the Perfect Storm”



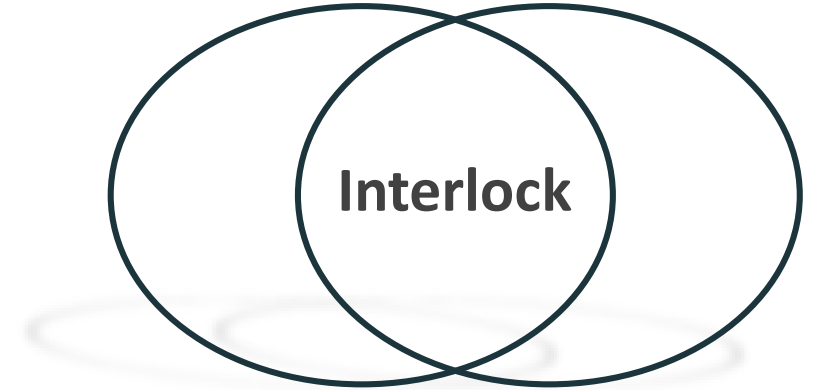
- Demonstrate cause and effect
- Even imperfect data will have the desired impact
- Be solution oriented
- Be positive
- Be transparent
- Avoid ‘de facto’ accountability

Interlock

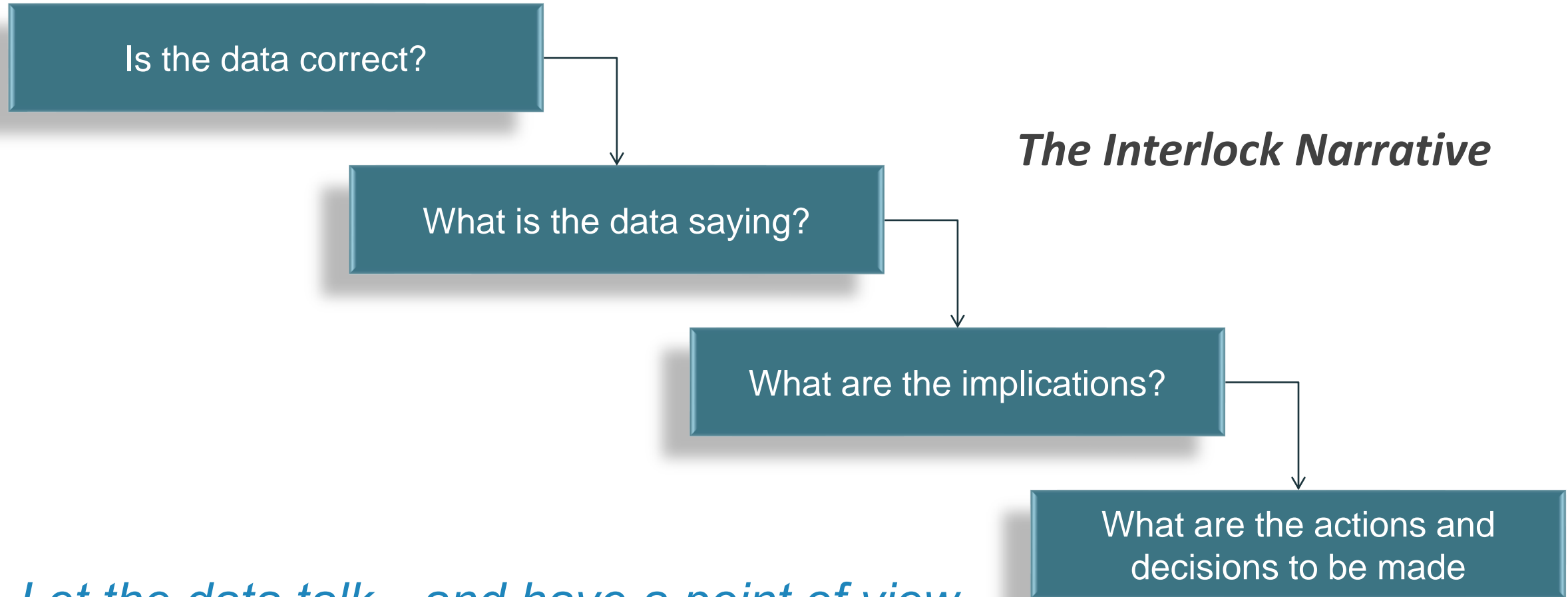
With Data and Accountability, get the stakeholders to the table

Some Key Considerations

- Interlock can and should occur at multiple levels.
- Interlock design will always be unique to how you are organized
- Keep it simple to the participants, even if it means more work for the RMO
- Have the data, and distribute in advance
- Forward looking and action oriented



Analysis



Let the data talk...and have a point of view

Conclusion

- Resource forecasting is not easy
- It takes work to get the data right
- Imperfect data helps drive accountability
- Interlock cements the accountability
- The result should be decisions and actions that address the future resource demand outlook



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