Deltek Special Edition

Resource Planning

FOR DUMMIES®

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Learn to:

- Get the right people on the right project at the right time

- Manage resources efficiently throughout the project lifecycle

- Increase profitability and employee loyalty by keeping workers engaged

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Deltek Know more. Do more.™

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Deltek is the leading global provider of enterprise software and information solutions for government contractors, professional services firms, and other project-based businesses. For decades, Deltek has delivered actionable insight that empowers customers to unlock their business potential. Twenty-two thousand organizations and millions of users in more than 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations, and deliver more profitable projects.

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Introduction

Successful and profitable projects, happy clients, and happy employees. That's what you want from your organization, right? You want successful and profitable projects that are managed with a seamless process, you need visibility into problems before they became real issues, and you've got to have it all on time and on budget.

In this picture of perfection, those on-time and on-budget projects create happy clients. These projects are completed by employees who are happy because they've been assigned projects that fit their specific skills, experience, and aspirations, employees who aren't overbooked or under-scheduled, who have visibility into their upcoming work and enjoy smooth transitions on and off projects. It's a wonderful equation: happy employees + happy customers = successful projects. Successful projects lead to winning more work, and that in turn creates a successful organization. That's nirvana!

Many organizations, unfortunately, only dream of this nirvana. Most wake up to big challenges related to managing their projects. Many use multiple systems to track progress, and they suffer when it comes to scheduling, budgeting, and resourcing. They can't find the right people to assign to the projects, so they have to compromise. They can't figure out why billing is declining, they struggle to accurately forecast revenue and profitability for proposals and actual projects, they can't seem to hire the right people fast enough, some of their resources are over-utilized some are underutilized — and they're tracking this nightmare using spreadsheets.

Organizations may focus on vastly different activities, but they often have a lot of goals in common — and lots of similar struggles as they strive to achieve those goals. Many organizations have project managers accessing six or seven systems to do their job, when they'd be much better served by a single central system with which they can plan their projects and manage the resources on those projects. Practically every organization struggles with synchronization of projects, resources, orgs, and

calendars across all systems. They also often find it tough to seamlessly move from a proposal to a real project. That have trouble knowing what's coming in the future and find it difficult to hire the right people at the right time. If only they could eliminate the dozens of spreadsheet systems that forecast and track their project budgets and resource plans.

Well, they can! And so can you. It isn't too late to make changes to your organization's project and resource management. Now's the time to accelerate the performance of your organization so you can reach the next level.

About This Book

Resource Planning for Dummies, Deltek Special Edition, walks through the concepts of effective resource management in a way that's intended to be easy to understand and helpful for getting started effectively managing resources for your project-based organization. The name of the game for a successful project-based organization is resource management, and it starts with knowing everything about your people — skills, availability, costs, and so on.

When you don't have the right resources available, it directly affects your finances when revenue gets pushed and margins erode. The indirect financial impact includes poorly run projects, unhappy customers, and under- or overworked resources who just might get frustrated and leave. Put the right tools and a collaborative platform in place, and you can get all the insight you need to scope, plan, and manage your people, so the right people are on the right projects at the right time. That's the focus of this book.

Foolish Assumptions

We've probably not met, but because you've picked up and opened this book, we're making a few assumptions:

✔ You're an executive or senior manager, resource manager, or project manager worried about the overall health of your organization.

✒ Your organization is struggling and searching for a new way to manage resources, make sure utilization is optimized, and ensure that projects are profitable.

✒ You would benefit from getting up to speed quickly on today's ideas for resource planning and management.

How This Book is Organized

Chapter 1: Staying on Top of the Trends — Data is the key to successfully planning and managing resources of individual projects, and all of the projects across the organization. A resource management system leverages that data in ways that just can't happen with a bunch of separate spreadsheets.

Chapter 2: Benefits Throughout the Project Lifecycle, and Beyond — Today's resource planning tools provide valuable information in real time, in all phases of the project — from opportunity to initiation to execution to closeout.

Chapter 3: Resource Planning in the Opportunity Phase — The sales and services teams no longer have to suffer through a tense sibling rivalry. Resource planning tools can have them collaborating instead.

Chapter 4: Now What? The Initiation Phase — Resource planning moves you smoothly from opportunity to initiation, helping you determine how and when to engage resources.

Chapter 5: Project Execution: Getting a Handle on Change — You can pretty much bet on details and situations changing as the project progresses. Resource planning can help you make change more predictable, help all players on the team understand their roles, and help everyone gain more visibility.

Chapter 6: Closing Out the Project — As the project winds down, it's time to move resources on to whatever is next, and take stock of what went right and what did not.

Chapter 7: Leveraging Technology to Manage Resources — It's easy to see if your company could benefit from resource planning. Now you just have to find the right technology for the job.

Chapter 8: Ten Ways Resource Planning Can Make a Difference — Here's some final food for thought. This chapter focuses on some of the ways that resource planning can help your company, its resources, and its financials.

Icons Used in This Book

As you work your way through this book, you'll notice some icons in the margins. Their purpose in life is to direct your attention to important information that you won't want to miss.

This book is packed with helpful hints for making resource planning work for you, and this icon helps you find them.

We hope you'll love every word, but if you're zipping quickly from page to page, don't miss what's next to this icon.

Resource planning is all about making things work better, but keep an eye on the information next to this icon to help avoid trouble.

Where To Go From Here

Turn the page, of course! Or turn more than one page if you prefer. We've outlined the chapters in the preceding section, so you can jump ahead to a particular topic of interest if you prefer. Really, read this book in whatever order suits you — it should make sense however you approach it.

Chapter 1

Staying on Top of the Trends

*C*hanges and advances in the world of project and resource management are sure to have a significant impact on today's project-based businesses. If you don't keep up with the trends, your competitors may pass you by, and the best talent might pick up and go work somewhere else.

This chapter shines a spotlight on trends in project and resource management, and explains how technology can help you manage the project-based world of today and tomorrow.

Getting a Handle on Resources

As a discipline, project management has been around a long time, and while resource management and planning is a much younger methodology, it's a vastly important part of project management. Resource management is the practice of making sure you have the right resources on the right projects and they are effectively utilized. When you run a services organization, people are your product, which means resource management is of the utmost importance.

Resource management is the process of identifying initiatives for resources based on priority, planning resource allocation, tracking resource usage and productivity, improving allocation, and measuring the effectiveness of resources.

Gartner, the technology research giant, has been paying more and more attention to the field of resource management. Analysts emphasize the importance of strategically reacting to change in today's challenging market, and that includes change that affects your resources. If you can't visualize where your resources are — their availability, skills, and capacity — it's difficult to allocate them efficiently and effectively. And if you can't optimally allocate resources, there's a greater chance your projects will fail.

These days, the organizations that manage projects well are those that have project and resource managers working closely together, making sure as needs change, the resources in their organization are optimally utilized.

Data and Visibility

Today's project managers must pay a lot more attention to financial matters. With better access to data, they're expected to have a better grasp of where their project stands. They're expected to meet predetermined financial performance metrics. Leaders in project-based organizations are increasingly enforcing these expectations and arming their managers with project financial data to help them achieve these goals. That said, many organizations still do things the "old-fashioned" way.

The most successful firms are able to quickly access the data they need to see project status, allowing them to be more proactive in mitigating issues and risk. That sure beats the old days, when project financial management was only realized during the invoice review cycle once a month.

Recognizing opportunities

Today's resource managers are seeking a much earlier understanding of the demand coming from sales opportunities. They need to be able to plan not just for current projects, but also for those in the pipeline. No more scrambling to plan

and resource a project at the last minute or without notice. Resource managers need visibility into the pipeline and collaboration with sales and services to make sure they can adequately service the client and the client's expectations.

Project automation is a must

Project managers are requiring a dedicated solution for project management to do their job effectively. There's no more room for amateurs, and no more managing projects on spreadsheets or disparate systems. Project managers need visibility into resources, costs, and financial impacts of projects in a central place so they can make informed decisions.

Looking forward, not back

Today's most effective project managers are implementing a much more proactive approach to managing projects now. They aren't simply looking back, but looking forward. Where they're going to be at the end of the project is the question. Running reports to see the status of a project is too after-the-fact for their tastes. PMs want to know where a project is going, so they can be sure it isn't off track. And if for some reason it veers off track, they want to be proactive rather than reactive.

Understanding the Value of Resource Management

Resource management is the key to optimizing utilization for all employees. Most firms still do this in Excel, but doing so typically limits visibility to a current week. It doesn't provide historical performance against scheduled work, nor does it give any visibility into current financial project status.

In fact, simply managing the spreadsheet is challenging. You can wind up having some resources double-booked while others are barely used, and you don't have sufficient visibility from manager to manager. And long-term planning? Forget about it. With a spreadsheet, once you get everyone's input, you need to further manage the document, and then call an

additional meeting to clean it up and optimize the week's work. And despite all that trouble, employees still lack visibility into their assigned workloads.

Talent retention is important

Like everyone else who manages people, resource managers and organizations have a strong desire to retain talent. That means they need to understand employee skills as well as the skills needed for each project so that the two can be matched effectively. They also must have a handle on bandwidth and utilization, because employees want work/life balance.

TIP It's also important to ensure that each employee's identity remains aligned to the goals of the company, not only the goals of a particular project. If the identity is tied only to the project, once the project ends that employee may not be content or may not feel he or she has a home in the organization. You need to create career development paths that look beyond the current project.

Technology can help

It's tricky to adopt resource management tools because there are so many options, and as a result, managers often fall back to using Excel for its simplicity. But simple isn't always better.

TIP To find and successfully adopt a better tool for streamlining processes, adoption must begin at the top and be consistently enforced through weekly project status meetings. One firm gave first dibs on resource selection to managers who adopted the company's new resource management tool. Everybody has favorite team members with whom they want to work, so you can imagine that adoption was quick.

REMEMBER As the new generation of employees starts to take on more of a leadership role, the need for resource management becomes more prevalent. Millennials rely more on technology and understand the benefit of a central, integrated resource planning tool — and will expect it in any organization they work for. The right tool encourages higher utilization, and most important, more projects delivered on time and on budget.

Chapter 2

Benefits Throughout the Project Lifecycle, and Beyond

. . . .

In This Chapter

▶ Looking forward, not only backward

▶ Employing resource planning throughout the project lifecycle

▶ Increasing employee loyalty by keeping workers engaged

. . . .

*I*t's difficult to succeed at adoption if you don't understand the benefits of resource planning from a higher-level perspective — the value it can bring through higher utilization, more successful projects, and increased profits. That said, resource planning isn't just for high-level management. Resource planning plays a significant role and brings significant value throughout the project lifecycle of every project, and for every member of the team.

In fact, resource planning is also a highly valuable tool for keeping those members of the team happy, engaged, and less likely to seek greener pastures elsewhere. You need your talent to remain in place so you can continue running your projects on schedule with as few changes as possible, and resource planning can help.

This chapter dives more deeply into the potential to bring value through resource planning. It steps back for a look at traditional project management and the project lifecycle. It explores how resource planning helps employ performance management strategies to boost employee engagement.

And it discusses how career development and succession planning — also with the help of resource planning — can keep the best employees on the team and ready to grow into new opportunities.

Project Management: A Historical Perspective

In the past, the concept of project management focused entirely on the project itself. It looked at one project at a time, in a virtual vacuum. Was the project successful? Did the project deliver on time and within budget? The project manager kept the project on track and managed customer expectations, and everyone was happy.

Notice the use of past tense in that preceding paragraph. Traditional project management focuses a whole lot on the past. How have things gone so far? Have we met deadlines? Have we kept within predetermined budgets? Therein lies the challenge of project management as it's done today: It looks backward, at the parts of the project that are already complete, instead of looking forward.

Today's technology provides a greater ability to plan effectively and track projects in near real-time, and that means the historical perspective no longer tells the whole story. Incorporating resource planning into the project lifecycle provides the opportunity to look forward and get a much more complete picture.

Bring resource planning into each part of the project lifecycle and you're far more likely to finish on time and within budget. Use resource management and planning across an entire organization and you boost your chances for higher profits. How can one technology do all this? By keeping track of resources — focusing on when and how those resources are being used, and ensuring that they're used optimally across all projects within the entire organization.

It's as simple as that. Resource planning can help increase your bottom line because it ensures that everyone is billing as often as possible.

TIP

Here's an example: If you operate a company of 100 employees and you can find just one extra billable hour each month from each employee, you can boost your bottom line by more than $200,000 a year (depending on the hourly rates you charge). Yes, nearly a quarter million dollars of extra profit, just by gaining a single additional billable hour each month from each employee. Imagine the impact on the bottom line if you can find two, three, or even more extra billable hours — especially from those employees with higher labor rates.

Resource Planning Within the Project Lifecycle

REMEMBER

Here's a peek at the value resource planning can bring at each stage of the project lifecycle, as shown in Figure 2-1.

✔ **Opportunity:** A better understanding of resources can help the business development team create proposals that are on target with price and timeline. On-target proposals — those based on actual availability of resources with specific skills and labor rates — are more likely to win work.

✔ **Initiation:** Once you've won the project, getting the project up and running without a hitch requires an understanding of available resources. Carrying resource planning over from the business development cycle to this stage helps you answer these critical project initiation questions:

- Are the resources you thought would be available actually still available?

- Do we need to hire additional staff?

- Do we need to bring on a subcontractor?

- Do we have team members with the credentials, certifications, or clearances required for the project?

- What about labor rates? If we change resources for the project, will it affect fees and, in turn, the profitability of the project?

Opportunity	Initiation	Execution	Closeout
• Assemble proposed team • High-level plan	• Proposal plan into project plan • More detailed plan • Hire to fill gaps	Adjust resources for: • Project scope change • Turnover • Resource optimization	• Re-assign resources • Update skills and experience
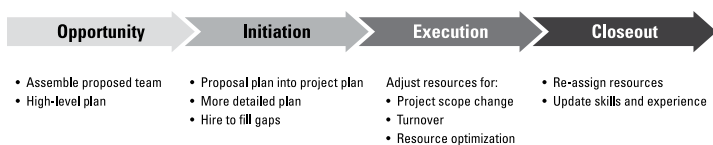
Figure 2-1: Resource planning plays a key role throughout the project lifecycle.

✔ **Execution:** During the project execution phase, it's critical to have the most accurate, up-to-date, and complete information. How else can you make the right decisions throughout the duration of the contract? Beyond project initiation, your project's success depends on having the right resources in the right place at the right time *throughout the project.* What if you need a particular resource for only two months? Resource planning helps you determine if this is someone you should hire, or bring on as a subcontractor or a temporary worker.

✔ **Closeout:** Yes, resource planning is important as the project winds down, too. First, it has a checks-and-balances function, tracking whether the figures in your execution phase were on target. Most important, however, it's critical for ensuring that resources move quickly and efficiently from one project to the next, minimizing the amount of time folks sit on the bench. That's one way you optimize your use of in-house resources and gain those extra billable hours.

Remember, optimizing people skills = increased profitability.

Although resource planning provides value at every stage of the project lifecycle of a single project, that is only part of the story. The ultimate value (and an industry best practice) is using resource planning across all stages of all projects across the entire organization. Resource planning gives you a highly visual, intuitive, and transparent resource overview across your organization. And remember that it isn't only for the higher-ups — this is valuable, fact-based information that can be accessed in real-time by senior, department, and project managers, as well as employees.

With a bigger-picture, long-term overview of the capacity across your entire organization, you can move smoothly among operational, tactical, and strategic planning. You can

increase profitability with a single, integrated solution that supports project planning and resource-related work.

In fact, the more you embrace resource planning, the more benefit you can achieve. The more clearly your company grasps the billable hours it has spent with a client and the more assiduously it invoices, the more your profitability will increase. It's essential to measure utilization and deploy the right resources to the right tasks throughout a project. That's how you'll reap the highest rewards.

Is Employee Loyalty a Thing of the Past?

Back in the old days, most people looked for a job only when they needed a job. Perhaps they lost their job, or they hated their job so much that they went looking for something new. Beyond that, employees were loyal to the company and the company was loyal to them. Remember those days? After several economic crises and changes in the market — including the 2000 tech bubble and the Great Recession of 2007 to 2009 — employees learned that being loyal to the company didn't necessarily mean that their jobs were secure.

That erosion of loyalty goes both ways. People simply aren't as loyal to their companies as they used to be, and the definition of what people consider to be "loyal" has evolved. In fact, a research study from Ultimate Software suggests that 25 percent of Millennials call it "loyal" if they stay in a job for as little as seven months. Boomers, on the other hand, believe the loyalty threshold is five years. Meanwhile, CareerBuilder research suggests that by the age of 35, a quarter of workers have held five jobs or more. Among workers age 55 and older, one-fifth have held ten jobs or more.

These days, people are more open than ever to a new job. In fact, 51 percent of workers who currently have a job are either actively seeking a new job or are open to the idea. That essentially means the majority of U.S. workers are "on the job market." Your organization faces more intense competition than ever to find, hire, and keep the best resources that are the key to executing successful projects and engagements

for your clients. So, how do you retain your best talent? A big part of the answer is resource planning, and the effective use of a resource manager (there's also more on the role of the resource manager in Chapter 4).

Keeping Your Employees Engaged

To successfully retain your best employees, the first step is making sure they're engaged. *Employee engagement* is the emotional and functional commitment that an employee has to his or her organization. Employees who are more engaged tend to be more loyal and, in general more effective workers. Check Figure 2-2 to see why employee engagement matters.

Employee engagement — the emotional and functional commitment an employee has to his or her organization

$11 **billion** is lost annually because of employee **turnover**

Companies with **engaged employees** outperform those without by up to 202%
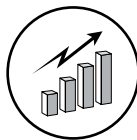
71% of all employees are **not fully engaged**

Figure 2-2: The importance of employee engagement.

WARNING! What's the opposite of engaged employees? Employees who feel undervalued, and those who feel they don't have enough guidance on how to grow their career. They may perceive a lack of recognition for good work, or inconsistency in performance measurement and goal setting. These are the people who are more likely to leave the organization.

Losing good employees is bad for the organization, but you'll also get heartburn from disengaged employees who don't leave. Those who stick around tend to be less productive, spreading a potentially infectious bad attitude that can discourage coworkers and turn customers off.

Getting employees engaged takes a combination of such things as performance management, career management, and succession planning — all of which are functions of resource planning. If you have a resource manager, these are responsibilities of that person.

Start with a consistent, company-wide approach to performance management to enhance accountability, visibility, and employee recognition. Automate and track the performance appraisal process, establish procedures for goal alignment and goal tracking, and provide employee coaching.

You're more likely to deliver quality goods and services — and drive higher profits — if you can ensure a high-performance workforce that's motivated, developed, and loyal to your organization. Automating your resource planning system is an important first step that will help you maintain the level of motivation your company needs. A good management system allows you to assess quality hires, achieve results, and develop valuable talent for a more effective working relationship.

Chapter 3

Resource Planning in the Opportunity Phase

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In This Chapter

▶ Understanding the rivalry between sales and services

▶ Creating cooperation and collaboration

▶ Taking value to the next level

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*T*he hallmark of a successful business development (BD) team is creating solid, accurately priced proposals — priced to win the bid while ensuring project profitability. To get that pricing right and, in turn, ensure profitability, the BD team must have a complete understanding of the resources available for that project and the organization must understand future resource needs if an opportunity closes.

This chapter explores how resource planning intersects with business development. It discusses why the sales and services teams historically have not always gotten along, and paints a picture of an alternate reality where collaboration yields success and happiness all around.

A Tense Sibling Relationship

Those involved in BD must be able, among other things, to make sure if they are bidding on an opportunity, the organization has the right resources to support the work. Achieving that, however, may not be as easy as it sounds. Just take a look at the history of the relationship between BD, or sales, and the services team.

Like lions and hyenas, sales and services have been longtime enemies, or at the least, tense sibling rivals. The job of the sales team is to close business deals for the company. The more business the team brings in, the more money the company makes. That, of course, means that the sales team is under lots of pressure to close those deals and bring in more business.

But here's the challenge. The sales group is essentially making promises on behalf of the services team. These promises, more often than not, revolve around such things as pricing, delivery dates, and available resources with the perfect skill sets.

Once the deal is signed, the burden shifts to the services team to make good on the promises that the sales team has made. In worst-case scenarios, the services team picks up the ball and is immediately in a reactive mode, scrambling to realign resources — sometimes even cutting from existing projects — to meet promises made by the sales team.

WARNING! What if the services team does not have the resources available to meet the promises mapped out within the contract? A whole lot of bad things can happen, including both direct and indirect impacts to the organization:

- ✔ Direct financial impacts of not having the right resources available include spiraling the project from profitable into unprofitable. What if you don't have the specialized engineer required to do the work? What if you have to hire someone? Margins erode when you have to use expensive resources or give away free hours because of under-scoped aspects of the project, and your revenue might get pushed.

- ✔ Indirect impacts can include poorly run projects, customer dissatisfaction, and overworked resources. Those impacts can lead to increased attrition of both employees and customers.

WARNING! And there's another negative impact: continued animosity between the lions and hyenas. If the sales team keeps promising things that the services team struggles to deliver, neither group is going to be happy with the other.

Collaborating Through Resource Planning

Now it's time to imagine a different reality. What if sales and services teams could work collaboratively through the help of a resource planning solution? Everyone wins — and that includes the customers! For the ultimate in successful delivery of projects, that collaboration has to begin long before the deal is signed.

What's in it for the services team?

The services team is tasked with completing the job and keeping the promises that the sales team made to the customer. Accomplishing that requires that the right resources with the right skills are available at the right time.

That said, at any given moment, the current levels of your organization's staffing and skills may not satisfy the needs of the business even three months from now, let alone six months or one year down the road. Resource needs and availability create a whole laundry list of questions.

- ✔ How do we plan and make the best choices to hire and train?
- ✔ Do we know how many people we will need, and when we will need them?
- ✔ Are some large projects potentially coming up?
- ✔ When will resources fall off major projects and be prepared to tackle new work?
- ✔ What kinds of projects are filling up our pipeline?

Without solid, reality-based answers to these questions, the only planning option is to make a best guess and be prepared to scramble when the deals close. And that isn't a good plan.

REMEMBER

In order to make informed decisions, services needs visibility into the sales pipeline, and that need goes far beyond an understanding of what's closing this month. The services team must have a long-term vision that looks months and

quarters into the future. That's particularly important for a professional services organization, for which it takes an average of 120 days to recruit, hire, onboard, and train a resource.

In addition to the general state of the pipeline, the services team must have visibility into the type of work being proposed. That includes details such as an overview of the proposed project, the skills and certifications required to perform the work, project length, and more. That's a wealth of useful information that helps the services team make longer-term decisions.

For example, if the BD team is putting together a bid that would require a resource for two months, it may be worth bringing in a subcontractor to fill the need. On the other hand, it might be a longer requirement, or perhaps the BD team is working on multiple other bids that would require a similar skill set. In that case, it may be worth taking the time to hire a new staffer who can then be used on other upcoming projects after this one is complete.

REMEMBER

Visibility is precisely what you'll get with good resource planning. If your organization enables this type of collaboration across teams — from the BD team to the services team — you can make highly informed tactical and strategic decisions far in advance.

Let's take collaboration one step further. Imagine the level of accuracy in pricing and project success if the sales and services teams work together in creating proposals. The possibilities are impressive. The services team is responsible for delivering successful, profitable projects, so imagine the accuracy in bidding if the services team can help scope, plan, and price the deals.

TIP

Even better, consider what could happen if company subject matter experts (SMEs) help create a "strawman" project plan. Sales can then present the plan to the customer to help seal the deal. Services can easily become part of the sales cycle with the help of resource planning.

What's in it for the sales team?

To reiterate, the BD team is under pressure to perform —
more signed deals equals more revenue. While some sales
folks prefer to work independently from the rest of the organi-
zation, it's far more beneficial to collaborate with other teams,
such as services.

Why? The answer is simple: information. Other parts of the
organization have information that can help the sales team
more effectively shape, price, and present a winning bid.

Take pricing, for example. This may be the most critical part
of your proposal. From a win/loss perspective, if the bid is
too high it will not win, but if the bid is too low, it may not be
taken seriously. From a profit perspective, if the bid is too
low — but becomes the winning contract — the project may
lose money. But, again, bid too high and you may not win
the chance to bring home those higher profits. But you can't
simply make a "guesstimate."

Same goes for the timeline proposed in your bid, and the
personnel. You've got to find that sweet spot where your pro-
posal is realistic and competitive but still profitable. That's
tough to do without good information.

By using resource planning in the opportunity phase of the
project lifecycle, the BD team gets visibility into staffing and
planning for all prospective opportunities across the organiza-
tion. That includes all current bids, as well as all current (and
closing) projects.

All too often, companies do not align project estimation with
existing capacity. Making guesstimates on projects is often
the key driver in resource under- or over-utilization. That can
be bad news right away for profitability, and also have a snow-
ball effect on subsequent projects as well as long-term utiliza-
tion. New people hired for one project may not be needed for
the next, at which point you're carrying additional and quite
possibly unnecessary overhead.

In a nutshell, by integrating your sales pipeline system with a
resource management and planning system, you can achieve
a better understanding of resource impacts, both short- and
long-term.

Taking Value to the Next Level

In a challenging economy, understanding the characteristics of your resource pool is critical. That is how, for example, you can package resources and proactively sell them to your client base. That drives increases in revenue by increasing overall billable hours, and that leads to higher profits.

Resource planning doesn't simply mean managing today's work. By knowing what future resource needs are, organizations can plan for those projects and have resources ready or hire if they need to. By identifying skills that the organization may not have been fully aware of, you can create new market opportunities for tomorrow. Resource planning can make this happen.

Integrating your sales pipeline with your resource planning system gives you the necessary information and confidence to bid on new types of work and a wider range of projects. You're in a much stronger position to succeed with new bids, because you already know if you can fulfill a project, should you be selected.

It truly is a win-win-win situation, one that helps to ease friction between different parts of your organization and lay the groundwork for greater success:

- ✔ Customers win because the project is far more likely to be delivered on time and within budget.

- ✔ Sales wins because those successful projects result in customers who are happy, more open to cross-selling and upselling, and more willing to refer other customers.

- ✔ Services wins because those on the team can align the right project resources, work with customers under proper expectations, and deliver against a project plan created by SMEs.

Chapter 4

Now What? The Initiation Phase

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In This Chapter

▶ Moving smoothly and quickly from proposal to initiation

▶ Deciding whether, and how, to engage resources

▶ Taking care of people with a resource manager

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Congratulations! Your sales team just won the bid, and it's time to start up the project. Now's when the plan comes together.

This is the phase in which the project manager (PM) and resource manager (RM) create the project plan with tasks and dates, mapping out which people are needed to do which tasks, at which times during the project, and for how long. This chapter discusses the value of transitioning a fully formed project proposal into an actual project, making hiring choices, and working to ensure that resources are utilized, happy, engaged, and properly challenged.

From Opportunity to Initiation

Consider a couple of different project initiation scenarios. First, let's consider a situation in which the BD team did not consult the services team and did not include resource planning during the opportunity phase of the project lifecycle. Spoiler alert: This isn't the scenario that's bound to have a happy ending.

In this scenario, the PM must create the project from scratch. There's no existing timeline because it wasn't in the proposal, there's no "strawman" project plan because the sales team did not bring in the subject matter experts, and there's no understanding of which resources will be necessary to get this project done on-time and within budget.

Now consider a wholly different scenario. In this alternate reality, the BD team and the services team worked collaboratively on the bid, using resource planning best practices to build out a sample project plan that identified the right people for the right tasks at the right times throughout the duration of the project. Starting to get the picture of where this one is headed?

In this scenario, the teams used resource planning tools to create the opportunity plan, which can now, with the click of a button, be turned automatically into the actual project plan. Think of time saved — weeks, perhaps? — because the plan has already been mapped out.

By using resource planning during the the opportunity phase of the project lifecycle, the stage is already set, the plan is already in place, the project team is already primed and ready to hit the ground running, and the customer sees a much faster project start.

The value is, you can create the project directly from the opportunity. You can secure the resources that were in the plan, and can now move to secure any additional resources necessary to click "Play" and start the project.

Note that there can be too much of a good thing, however. One of the biggest challenges facing organizations is the tendency to use too many resources on a particular project, or putting in time that isn't billable, just to keep the customer happy. Yeah, happy customers are important, but this is a recipe for lower profitability.

The most common cause of this is a lack of proper resource planning at project initiation. No clear overview of planned resources, and no plan for billing against what your people actually deliver, can create quite a gap between the two. And that gap can mean the difference between profit and loss on an account or project.

REMEMBER

That's why it makes so much sense to integrate resource planning with your project plan *at project initiation*. Doing so provides improved insight into the critical path — allowing you to focus on using the right resources at the right times.

Hire or Sub?

As mentioned previously, your planning process includes making the decision between bringing in a subcontractor, or hiring someone to join your company. The initiation phase of the project lifecycle is the time to make those final decisions. You'll base the choice on the actual project plan and a specific understanding of which resources are needed at which times throughout the project.

This is the place to consider all available resources through the duration of the contract. Imagine that the project is tasked with delivering precisely what your company does, but there's one small piece that's outside the skill set of your current resource pool. How long will that task take to complete? How many resources will be required? Are there other projects in the pipeline that have similar requirements, or is this a one-off need?

REMEMBER

In this scenario, you use your resource planning tools to look at the needs of the just-initiated project, while also taking a broader look the pipeline. It may suffice to bring in another company do to the specialized work. Or, if other bids that also require this unique skill set are being prepared, perhaps you'd be better off bringing on a series of people in a temp-to-hire scenario, so that new projects can be staffed immediately if your company wins those additional bids, but you aren't initially on the hook with permanent hires.

What's a Resource Manager?

Starting at the initiation phase and moving forward, this is the time during which the PM is likely working most closely with the resource manager.

The conversation thus far has focused on the importance of resource planning, and in particular, throughout the project

lifecycle — focusing on the value offered by resource planning tools. But there's more to the story. Best practices encourage companies to name a resource manager to "own" the resource planning process and, more than anything, serve as your resource advocate.

REMEMBER

Remember, the project manager's primary concern is the project, and whatever is good for the project. A *resource manager*'s primary concern is the well-being of the company's resources.

Say, for example, there's a highly sought-after software developer named Joe, and all the PMs in the company want him on their projects. Let's say Sally, the PM on a newly won bid, secures Joe for her team. Now that Joe is on the team, Sally would very much like to keep Joe in place on her contract for the full duration of the contract — four years — so she can continue to offer his skills to the customer and provide project stability.

What about Joe, though? What if he doesn't want to do the same thing for four years straight, with no change? This is where the resource manager, or RM, steps in as Joe's advocate. The RM works with Sally at the contract initiation phase — before execution — to set an expectation regarding how long Joe can spend on this contract before moving on to new work, so he can continue to enhance his skills. The RM also works with Sally to find a suitable replacement for Joe when the time comes for a transition, and helps determine the best roll-on/roll-off strategy.

TIP

Think of the resource manager as being like a finance manager, but for people. The RM keeps track of all resources and their skill sets, certifications, schedules, and more. The RM ascertains and stays in touch with employee career aspirations to help enhance employee retention.

In the project's next phase, the RM takes an even more active role in the resource planning process.

Chapter 5

Project Execution: Getting a Handle on Change

In This Chapter

▶ Embracing the changing reality

▶ Making change predictable

▶ Enabling successful collaboration

▶ Increasing visibility into projects

*T*he next phase of the project lifecycle, the execution phase, is where the proverbial rubber meets the road. During the execution phase the actual project plan is in motion, and the project manager must be able to actively track all project tasks and resources in near real-time.

This chapter focuses on how resource planning tools guide you through the ever-changing landscape of project execution. It demonstrates how resource planning can bring predictability to potential chaos, help collaboration succeed even when the collaborating players are changing, and help everyone from the individual player to the executive team gain visibility into projects across the organization.

Getting Used to Change

REMEMBER

The execution phase is the most ever-changing and, in turn, the most challenging of the phases. People come on and off the project as tasks are complete. Their tasks must be tracked, the deadlines must be tracked, budget items must be tracked — and resources must be tracked across all of these.

Even if a PM is completely on top of the plan and any revisions, almost no contract goes exactly according to plan. Here are some of the things that can throw a wrench into the works:

✔ Perhaps the organization lands an even higher-priority contract that requires some of the resources you've already claimed for your team. Or, perhaps your contract has been bumped up to a higher priority, giving you access to greater-skilled resources than you anticipated — resources that carry higher bill rates.

✔ Perhaps the customer is so pleased with your company's work that it requests a modification expanding the workload. Or, on the other hand, perhaps the customer is not pleased with your company's work and issues a modification cutting the workload.

✔ Perhaps resources have left the company unexpectedly; or, perhaps your company acquires another and you suddenly have access to a plethora of resources with sought-after skills.

Changes are the norm and should be expected. That's why the execution phase of the project lifecycle requires lots of flexibility and juggling. Successful resource planning keeps your puzzle from falling apart.

How? Specifically, resource planning during the execution phase provides:

✔ Predictability

✔ Collaboration

✔ Visibility

Making Change Predictable

Consider the case of another contract taking higher priority over yours, forcing a change in your resources. In this scenario, the resource manager — guided by a resource planning solution — can help you find alternative resources a whole lot faster.

REMEMBER

The same attributes that made resource planning so helpful in the earlier stages make it a great problem solver at this point. With a resource planning solution you'll know who matches the skill set you need to bring in in order to have the least impact on the project, and you'll know the labor rates, too.

Helping Collaboration Be Successful

Resource planning can also ensure everyone on your team understands his or her role, as well as each other's roles, as things move and change throughout the project. It's the key to running as a well-oiled machine, even as some of the parts shift around.

What happens, for example, if someone leaves or joins the team? How will you handle transparency in that situation? Or, perhaps there's a change in project scope or there's been a contract modification — remember, those things are possible if not likely, because change is the norm during this project phase. The last thing a project needs is for someone to start working on a particular task without knowing it's been deemed out of scope or not a priority for the project.

REMEMBER

Collaboration is critical during the execution phase of the project lifecycle, and good resource planning provides exactly the collaboration you need to ensure all team members — including the project manager and resource manager — are on the same page.

Increasing Visibility

Project and resource visibility is important at all levels of the organization. Just as it's important for all team members to be able to collaborate effectively, it's equally important for appropriate team members to have visibility into the project. That includes a team member's own individual role as well as a bigger-picture perspective.

What's planned for me? What's planned for the team? What's planned for the project? Isn't it best for players to know the answers to these questions? Resource planning tools will provide that visibility across the team. In fact, if everyone can see pertinent information about the project, it helps make that one-person-working-out-of-scope scenario much less likely.

Visibility is one of the advantages of resource planning that scales from the individual team member to the PM and up through corporate management. Everyone can benefit from increased visibility.

The most effective resource planning lets you monitor availability, load, utilization, and revenue across all resources, and easily assign people to tasks relating to both projects and opportunities. You can make project plans and estimate the cost and revenue of opportunities and real projects, and you can monitor progress with actuals against baseline at any time.

In fact, good resource planning tools will provide a dashboard that managers can log into every day. That dashboard can display an array of the key performance indicators that the manager wants to see most: utilization, billability, project resource loads (3, 6, and 12 months out), subcontractor usage, and much more.

Take this a step further and you can use resource planning to underpin and drive your business operations. You can bring time scales, role-needs, and other key elements into your resource planning and link it all to your overall business strategy.

Resource planning tools provide a depth and breadth of short-, mid-, and long-term analysis and reporting. They add visibility into even the tiniest detail of individual projects, and bring it to the highest levels across the organization.

Chapter 6

Closing Out the Project

*A*ll projects end, and when they do, team members must have something else to move to — another project to work on so they can continue to be billable. Companies must prepare for this transition well in advance of a project close-out in order to execute the plan and move smoothly forward.

This chapter focuses on the kinds of things that resource planning tracks at this point in the project. You're transition-ing to the next project, while making sure you know what went right with the project that just ended, and what did not.

Questions to Ask at Closeout

Before a project ends, there are many, many questions to be answered. There also are many things that must still be tracked during and after project closeout.

REMEMBER

The most obvious question is, where will the team members go next? But there are a lot of related queries that go hand-in-hand with that overall question:

✔ Are there other, similar projects available for this proj-ect's resources? If so, when will those projects start, or have they already started?

✔ If there are multiple needs across multiple projects, which resources should you send to which project?

✔ Will the next project require ramp-up time?

✔ If there is ramp-up time, is that time billable or will it be overhead?

✔ And if there's ramp-up time, will that affect the successful start of the next project? Will it be short on resources during the ramp-up?

REMEMBER You should consider all of these things during project closeout, and ideally, before the closeout. Guess what will help you answer these questions? Yes, resource planning. Your resource planning provides information on other projects — and, in fact, all other projects throughout the project lifecycle. That will help determine what other work is available, the timing of other billable work, the details of what the work requires, the targeted labor rates, and much more.

Keep on Tracking

As the project closes out, resource planning continues to collect valuable information. It isn't only a matter of ensuring success with the current project — these details play a key role in keeping the momentum going and the successes rolling.

Follow skills, not just bills

It's vital to keep the billable work flowing, but simply ensuring that resources are billable is only a small part of what must be tracked. More often than not, team members pick up additional skills as they work through the life of a contract. They may, for example, be acquiring new experiences, learning new skills, gaining new expertise, working in a higher-level managerial capacity, or getting job-related certifications.

TIP However your team members are adding to their skill set, it's important to continue to track and update each person's qualifications. In fact, tracking that information can affect the bottom line. That's because a person who has added new skills, certifications, or expertise can now demand a higher labor rate.

The good subs, and the not-so-good

You can't be satisfied with tracking only internal resources. It's just as important to track resources outside the company, such as subcontractors. You need to always ask, were there subcontractors on the project? If so, how did they do?

If the subcontractor performed well, it's definitely worth tracking so you can work with the same company in the future. On the other hand, if the subcontractor didn't perform well, or as expected, that's information you need to track, too, because you won't want to work with that company again on future projects.

Making success happen again

With the project complete, project closeout is the ideal time to assess the success of all the points of the contract, so you can replicate that success. In other words, track what went well so you can do it again.

TIP In fact, because good resource planning tools will tie into your project planning software, that gives you the opportunity to precisely replicate the project and the skill set of the team. Do that by using a templatized version of the project plan on the next project that's highly similar.

Also, if things have gone *especially* well, now's the time to consider bringing in the marketing team. Your marketing specialists may want to write up a case study about the project, as long as the customer is happy and is willing (and allowed) to participate. Perhaps the marketing team would like to nominate the project for an award, either on behalf of the customer or in the name of your own organization.

REMEMBER Yes, there are cases that don't go as well, and it's just as important to track those, too. Project closeout is the ideal time to assess which points of the contract did not go well, and why. That way you can be sure to change processes, procedures, or personnel for the next project. The only upside of mistakes is your chance to learn from them, and tracking is how you do that.

Best Practices for Employees

Tracking is vital throughout the project, all the way up through project closeout. But it isn't only about keeping tabs on project tasks that are billable. You should consider using resource planning to track tasks that may not be billable, but are still important or — in some cases — critical to the company.

Think for a moment about the value of market research or technology upgrades. Who does this work on a regular basis? It may work to your advantage to have between-project staffers work in these areas.

REMEMBER

A sophisticated resource planning tool can track this type of utilization, and connect it with the value provided to the company. Your resources can still be highly beneficial to projects, or the company overall, even if they're not necessarily billing. Consider this like a holding area where people can stay busy, work hard, and even enhance their skill set. Resource planning ensures that you understand the value of this situation.

In fact, best practices suggest that your resources should not be any more than 95 percent utilized. Employees need time for training, for learning, and for furthering their careers outside of project work. Effective resource management plans for this kind of down time as part of each employees' responsibilities.

Yes, resource planning goes well beyond tracking vacation time, sick time, and time that is otherwise billable. It accounts for non-billable time, too. It's an acknowledgement that non-billable time is often among an employee's most valuable. Pay attention to these details and your organization will stand a better chance at high employee retention.

Chapter 7

Leveraging Technology to Manage Resources

*S*till not sure if you need to implement resource management and planning? Consider what happens if you neglect resource planning. You just may convince yourself. This chapter explores what happens when resource planning gets short shrift, and shows how technology can make a difference.

A winning strategy needs a solid foundation. For resource management, the foundation to build on is technology. It can make your life easier, create a better experience for the user, and improve the bottom line. Use of technology helps younger workers (millennials) feel more at home in your organization.

But, you don't want just any technology. You need the *right* technology. From laying the groundwork to picking a solution that allows you to have your resource management in one central location, this chapter guides you through the process. If chosen wisely and implemented successfully, technology can be a tremendous answer and the key to working more effectively and efficiently. That's true for all businesses, but especially those whose product is *people*.

Signs That You Need Resource Planning

REMEMBER

Here are seven sure signs that your organization is missing out on the benefits of a resource planning solution:

1. People appear busy, but utilization rates remain low.

2. Some people are always overloaded, while others often have available capacity.

3. Project planning is based on guesswork.

4. You often over-service clients because you have no baseline budget overview.

5. You aren't getting the most out of your people's talents because you haven't mapped their skills.

6. You can't compare your long-term project pipeline to your planned capacity.

7. Your resource planning is based on local spreadsheets because you don't have a solution to manage your most important asset: your people.

If these situations sound familiar, it's a sign that your company could become more profitable by implementing a uniform resource planning solution. Resource planning can make your life easier, create a better experience for the user, and improve your bottom line.

Technology to the Rescue

Yes, resource management and planning functionality can be found in traditional enterprise resource planning (ERP) systems, but that type of functionality tends to focus on managing resources on single projects, rather than looking at resources overall.

REMEMBER

A central resource planning system that puts all resource management information in one place helps consolidate all account and project information. It provides you with a single and accurate version of the "truth." You'll have consolidated information based on actual data, in one place rather than

across multiple spreadsheets from local managers — you get visibility of account and project progress across the organization, from project manager to senior management, and you increase utilization across your entire organization.

Finding a Solution for Technology That Works Better

Many organizations work with multiple software programs as they try to manage resources — Excel being one of the favorites. Having resource data in HR systems, enterprise resource planning (ERP) systems, and Excel, with no ability for data to be used in one place — does that make sense?

Strong arguments exist for eliminating silos and implementing one resource management strategy. Managing multiple solutions can be time consuming, often costs more, and ultimately delivers a poor user experience for the employee. A central place for resource management was hard to come by in the past, but it's a whole lot more feasible now. A central place for resource management crosses the entire lifecycle of project opportunities, project initiation, project execution, and project closeout.

Here are more details on the benefits of a central solution:

✔ **Siloed solutions:** Consolidating resource management in one place makes it easier for the organization to have complete visibility of resources.

✔ **Strategic versus transactional:** Free up resource managers to manage people on projects, not worry about updating multiple spreadsheets and taking too much time to plan.

✔ **Consistent employee experience:** A central, easy-to-use system drives better adoption of the technology.

Here are some things to seek in a resource planning solution:

✔ It provides a simple, flexible user experience, because resource and project planning varies by company.

  ✔ It allows for people at different levels and competencies to plan optimally. You want a solution that facilitates higher-level, more resilient, flexible planning. The solution should provide options for drilling down, but it should keep users from getting lost in too many details.

  ✔ One view combines the planning of projects and resources.

  ✔ It's complemented by experienced consulting services if needed, including pre- and post-implementation review and support.

Millennials are, of course, all about technology, so they're worth mentioning in this discussion. This is the first generation in the workforce that grew up with today's most common computing and communication technology, and they've carried that savvy into the workplace. Keep in mind that the majority of the workforce is now Millennials, and their influence and dominance will continue to grow. Technology is not optional, but rather is critical for attracting and retaining talent from this generation.

Changing Behaviors

No mention of technology would be complete without also discussing behavioral changes of the employee end-users. Any time you implement something new such as technology, you're asking people to do and act differently. However, adapting to change does not come naturally to human beings, and all the change in the world won't bring progress if its implementation and adoption aren't managed well.

Figure 7-1 shows acceptance versus resistance to change, which is a fairly balanced number. But, 50 percent sitting on the fence demonstrates where an effective change management solution can be most successful. Ignoring the behavioral component allows a larger percentage of the 50 percent to slip into the "resist change" category, which could ultimately kill the technology implementation. On the other hand, effective management of that change can pull more of those 50 percent onto the side of acceptance.
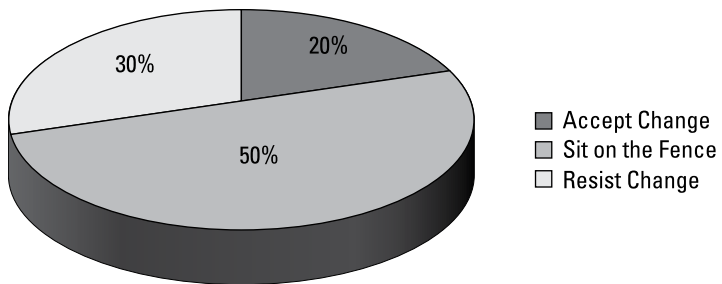
Figure 7-1: How well is change accepted?

Organizational change management (OCM) is a structured set of strategies and activities designed to move a group of people from the current state, through the transitional state, and into the desired future state. (Read more about it in *Organizational Change Management For Dummies.*) An effective OCM strategy — along with arming and equipping the user with the right knowledge and tools — helps ensure the success of the implementation and the adoption of the technology. Don't forget, technology doesn't do you any good if no one is using the systems.

Many different methodologies for change management are available, but some consistent components are common to all methodologies. The typical components of OCM include:

- ✔ Assessment of readiness for change
- ✔ Shared vision
- ✔ Communication planning and execution
- ✔ Impact assessment and transition planning
- ✔ Support of new behavior
- ✔ Measurement and feedback of results

Because an organization is a culture of living, breathing people, a successful OCM solution requires understanding the culture — one size does not fit all. Although you can apply the same OCM methodology across multiple organizations, the tactical activities are influenced by how people within those organizations and cultures best communicate, learn, and manage projects and processes.

Ultimately, change is a choice for people, and many will resist it unless you can help them understand why the change is important, how it will benefit them personally, and how it will positively affect the business. Communicate, communicate, communicate — while equipping employees with knowledge and tools needed to successfully adopt the technology.

Finding Resources to Learn More

This chapter explored how technology is the foundation for your resource management strategy. It discussed how to successfully leverage the right solution: a central place for resource management that will help you meet business objectives while making it easier for users to access and accomplish what they need. This chapter also looked at driving and changing behaviors through the typical components that make up a successful organizational change management strategy. But this discussion really just scratched the surface.

The next step for you is to learn more about technology and OCM to help you develop a winning resource management strategy. The following are resources to build upon your learning:

✔ Deltek Resource Management Solutions: `www.deltek.com/Resourceplanning`

✔ *Talent Management for Dummies:* `www.deltek.com/resource-center/dummies`

✔ *Organizational Change Management For Dummies:* `www.deltek.com/resource-center/dummies`

✔ *Project-Based ERP For Dummies:* `www.deltek.com/resource-center/dummies`

Chapter 8

Ten Ways Resource Planning Can Make a Difference

*R*esource planning solutions can seem downright magical in terms of how they help your business prosper. This chapter focuses on some of the ways that resource planning can make a big difference for your company, its resources, and its financials.

It's Like a Crystal Ball

Project management has traditionally involved a lot of looking back — measuring how a project has been going by tracking where it has been. Everyone can learn something from the past, but it's even more helpful to be able to track the present in real time and be in close touch with where a project is headed in the future. Resource planning systems can help enable that kind of proactive thinking about projects and resources.

It Focuses on Employee Satisfaction

Hiring new employees is a hassle, it's super-expensive, and it slows down processes and progress. Better to keep your existing employees happy and engaged, so they'll stick around. Resource planning helps keep your team members happy, because you can place them in the right challenges, and also keep track of their aspirations and readiness for something different.

It Can Squeeze Profits Out of Thin Air

You'd be amazed how much more profitable your company can be if you could only get just a little bit more billable productivity out of each employee. It really adds up, even if all you gain is an extra billable hour a month from each employee. That's barely noticeable for the employee, but huge on the bottom line, and resource planning can help make it happen.

It Can Help You Win Business

For project-based businesses, the expertise of your people is the main product you're selling. How in the world can you bid on projects, and win them, if you don't have a good feel for what people resources will be available, what skills they offer, and how much they'll cost? Resource planning can help your sales team craft bids that are realistic and fair — bids that have a better chance of winning, and a better chance of being profitable if you're chosen for the job.

It Can Be a Peacemaker

If your company is like most, there's a little bit of tension between your sales team and the services team that will

deliver the project. Or maybe a lot of tension. Or maybe open warfare. The services team thinks the sales team is over-promising, and the sales team thinks the services team is under-delivering. Resource planning helps the sales team make promises that are grounded in reality, and it allows the services team to play a greater role in helping to prepare proposals. Understanding is greater, arguments are fewer.

It Can Inform Hiring Decisions

Hiring new people takes a lot of time, and it costs a lot of money. Everyone is better off if you can get a good head start hiring, early enough that the new resource is in place when needed. Or, perhaps you're better off subcontracting and not hiring for a particular task. How in the world do you know what the best approach is? Resource planning. It helps those who are doing the hiring have some idea of what is in the sales pipeline, while deals are still being made.

It Can Ease the Pain of Change

During project execution, change really is the norm. Resource planning helps you to adapt well to changing circumstances. If you need more people, or if some of your team drops off, resource planning provides a detailed roster of whom you might add to the project. You'll have insights into availability, skills, and costs. It's also helpful as people roll on and roll off of projects in midstream.

It's a Roadmap to the Next Stop

As projects near their close, resource planning steps in to help you figure out where the players will head next. Some may be ready to roll right onto the next project, while others may benefit from some training, some time handling non-billable corporate tasks, that kind of thing. You want to maximize billable hours, but at the same time, avoid burning out valuable employees.

It Helps Track New Skills

Most employees want to learn and grow in their jobs, and if you play your cards right, they may learn on the job. The project they're on may stretch their skills, or teach them new skills, or put them in a greater level of responsibility or supervision. These are good things, and resource planning can help you keep track of these advances to ensure that you're billing properly and providing an enriching employee experience.

It Helps You Repeat Your Successes

When things go right, you want them to keep on going right. Resource planning is all about that. Proper tracking in the closeout phase can help you determine what about your team's efforts really worked, and what didn't. You can then maximize the good and fix the less-than-good. You can even take a report from a successful project and turn it into a template for landing and executing the next similar project. That'll save you a whole bunch of time and trouble, and make it all the more likely that success will breed more success.

Project success starts with effective resource planning

The key for any successful organization is resource management, and it starts with knowing everything about your people — their skills, availability, and costs. This book walks you through the concepts of effective resource management and shows you how to get the right people on the right projects at the right time.

- *Initiate projects smoothly* — *determine how and when to engage resources*

- *Stay on track* — *execute projects efficiently, and make change more predictable*

- *Transition productively* — *when the project winds down, move resources where they're needed*

Open the book and find:

- **Strategies to maximize profit through resource planning**

- **How to increase visibility across the project team, and at all levels of the company**

- **What to look for in a resource planning solution**

- **Ten ways resource planning can increase utilization and help you save money**

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