Optimizing Strategic Delivery & Adaptability
Thru
Effective Resource Planning

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Project Controls EXPO
London, UK

Optimize Strategic Delivery & Adaptability, Without Talent Burnout

"Everyone has a plan until they get punched in the mouth"
-Mike Tyson

Quickly & confidently answer the resource questions organizations ask when executing strategy:

- Which resources are delivering my strategy?
  - Which initiatives should I delay?
- Will I speed delivery if I hire more people?
- What if I cancel a program, or product?
- How should we reduce budget or headcount?
- What if an epic or project slips?
- What if I reassign resources?
- What if I pause an initiative?
- ***What if I expand a team?***
- What if I split an epic or project?
- What if I contract an initiative?
- What if link initiatives together?
- What if I shift task timing?
- Who should I repurpose?
- What if I replace FTE with contingent labor?

- What teams/people/roles are delaying strategy execution?
- ***Which initiatives are delayed due to resource availability?***
- What if I delay an initiative?
- ***When will teams or roles with the right skills be available?***
- When should I start a new initiative?
- How many proposals can we approve?
- Where do I have skill deficiencies?
- What people and funding do I need to start an initiative now?
- If I approve this proposal, when can I do it?
- If I cancel this effort, when can I re-start it?
- ***How will delaying this initiative affect other key deliverables?***
- How many of this type of project can I do next year?
- What's the impact of doing 5 more of these audits?
- What if I increase allocations for a specific resource or team?
- I don't believe my capacity, what if it's 20% lower?

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How Organizations Adapt to Business Change Matters

40% Of the global workforce is likely to consider leaving their current employer within the next year

-Microsoft 2022 Work Trend Index

By 2025 "labor volatility" will cause 40% of organizations to report a material loss, forcing a shift in talent strategy from acquisition to resilience.

-Gartner 2022

Replacing exiting workers costs one half to two times the employee's annual salary

-2021 by Gallup

CEOs' Top 10 Strategic Business Priority Areas for 2022-2023
Summary Top Three Mentions, Coded Responses

Priority	Value		Change From 2021
Growth	51%		▼ 8%
Tech-Related	34%		▼ 5%
Workforce	31%	Up From Fifth in 2020	▲ 32%
Corporate	29%		▼ 5%
Financial	20%		▼ 27%
Products and Services	15%		▲ 43%
Customer	15%		▲ 26%
Environmental Sustainability	9%	Up From 13th in 2020	▲ 292%
Cost	9%		▼ 24%
Sales	6%		▲ 77%
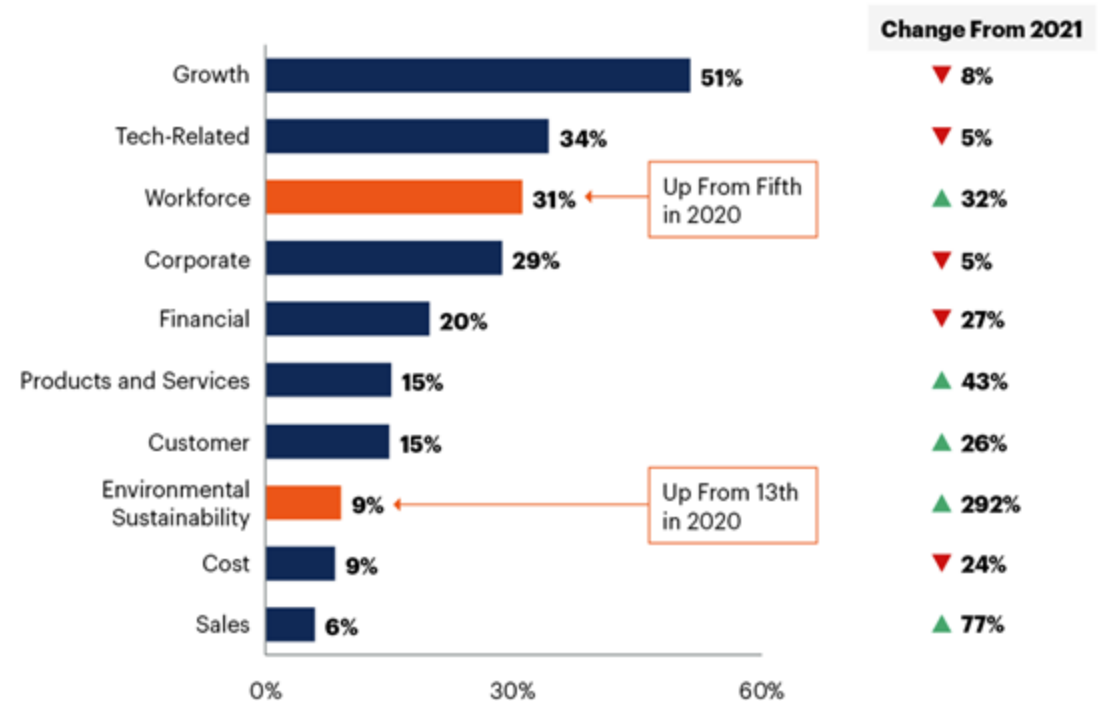
n = 410, all respondents

Q: Please tell us about your organization's top five strategic business priorities for the next two years (2022-2023).
Source: 2022 Gartner CEO and Senior Business Executive Survey
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Gartner

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Measurable Benefits Transforming from PPM to RPM *in the First Year*

"Maximum **user acceptance** for planning and TimeSheet."

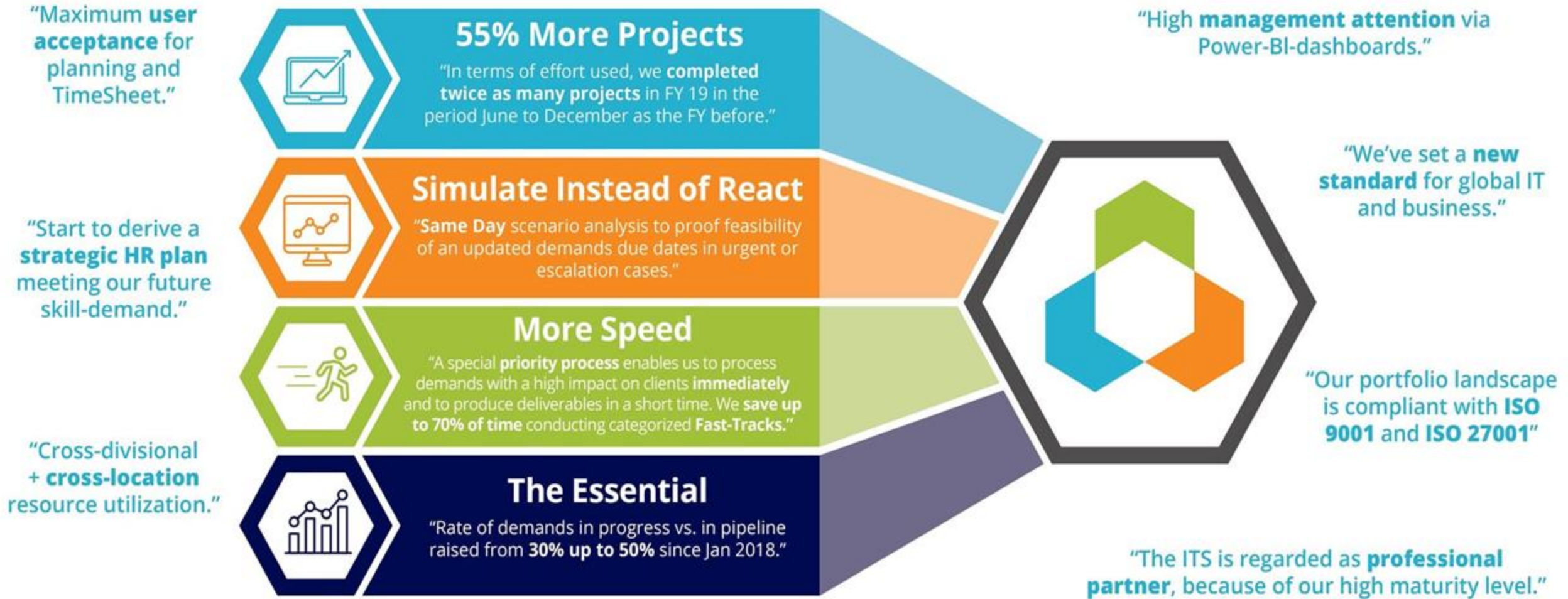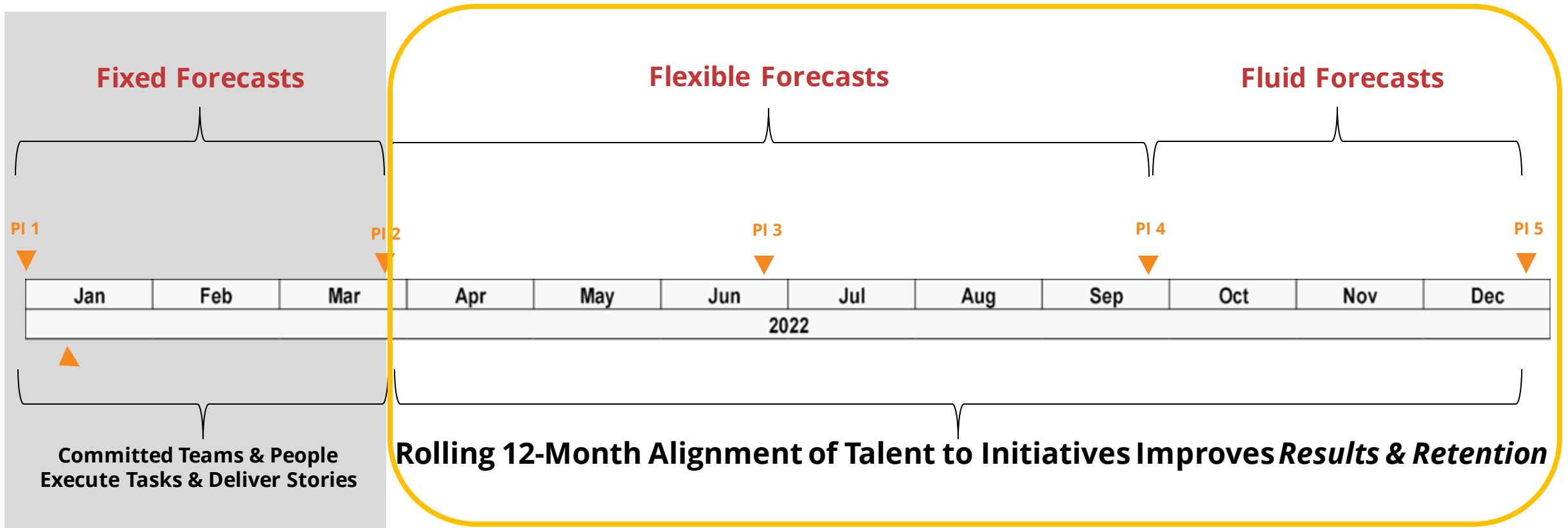"High **management attention** via Power-BI-dashboards."

55% More Projects
"In terms of effort used, we **completed twice as many projects** in FY 19 in the period June to December as the FY before."

"We've set a **new standard** for global IT and business."

Simulate Instead of React
"**Same Day** scenario analysis to proof feasibility of an updated demands due dates in urgent or escalation cases."

"Start to derive a **strategic HR plan** meeting our future skill-demand."

More Speed
"A special **priority process** enables us to process demands with a high impact on clients **immediately** and to produce deliverables in a short time. We **save up to 70% of time** conducting categorized **Fast-Tracks.**"

"Our portfolio landscape is compliant with **ISO 9001** and **ISO 27001**"

"Cross-divisional + **cross-location** resource utilization."

The Essential
"Rate of demands in progress vs. in pipeline raised from **30% up to 50%** since Jan 2018."

"The ITS is regarded as **professional partner**, because of our high maturity level."

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Earlier Upstream Alignment Promotes Predictable Delivery

Fixed Forecasts

Flexible Forecasts

Fluid Forecasts

PI 1 PI 2 PI 3 PI 4 PI 5

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

2022

Committed Teams & People Execute Tasks & Deliver Stories

Rolling 12-Month Alignment of Talent to Initiatives Improves *Results & Retention*

3 to 6 months on average to hire & onboard new talent *-Resource Management Institute 2022*

CENTRALIZE Upstream Roadmap & Resource Planning to Enable Adaptive Delivery
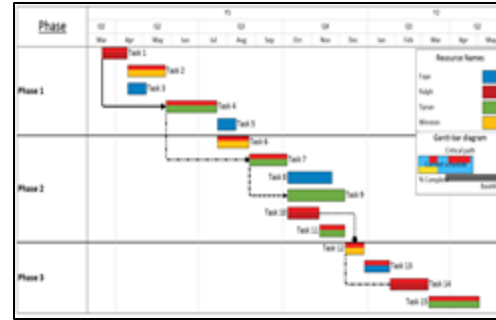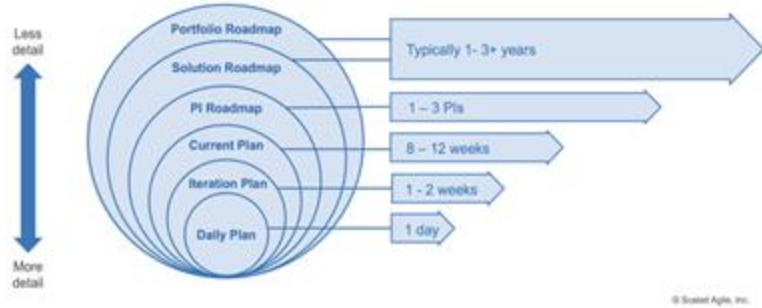
Agile Initiatives:
12-Month Product Roadmaps

Waterfall Projects, Audits, Studies
Program & Portfolio Roadmaps

Operations Work:
12-month Staff Planning Roadmaps

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ANALYZE: Categorize, Prioritize, Shirt-Size

NAME		ART/ORGANIZATION	TEAM/ROLE	DEFAULT RATE	DEPARTMENT	
FY	Faith Young	Legal	Project Lead	$ 110	Purchasing	
FG	Felicity Glover	Personnel Relations	Technology Manager	$ 45	Accouting and Finance	
FP	FP Civil Team (3 people)	FP ART (Federal Products)	FP Civil Team	$ 360	CoD Federal	
FP	FP Mechanical Team (4 people)	FP ART (Federal Products)	FP Mechanical Team	$ 480	CoD Federal	
FP	FP Techn					
GR	George					
HR	Harold					
HS	Heather					
HK	Helen K					

Teams & People:
Role, Capacity, Organization, Rate

NAME	PORTFOLIO	RANK	KANBAN STATE	PRIORITY	SENIOR LEADER
Barracuda Phase 9	Commercial	1	Delivery Phase	⬆High	Cameron Paige
Bender Phase 1	Regulatory & Risk	2	Analyzing	⬆High	Trevor Harrison
SOX 2 Review	Regulatory & Risk	3	MVP Implementation	⬆High	
Aurora Phase 15	State & Local	4	Backlog	⬆High	Cameron Paige
Assets Database Design Phase 12	IT	5	Design Phase	⬆High	Trevor Harrison
Quicksilver Phase 7					
Barcelona Phase 13					
Malibu Phase 11					
Zulu Phase 10					
Cinnamon Phase 20					
Phoenix Phase 15					
Nautilus Phase 8					
Canary Phase 3					

Initiatives:
Priority, Program, Strategic Theme

INITIATIVE NAME
Hypersonics Project [Checkout]

Start date 01/01/2022   End date 07/04/2024   [Allocation] Demand   ○ Planned

Resource   Feature/Task   ⚙ Options   ⊞ Choose attributes   Initiative   Quarter   **Month**   Week   Day   TIME   COST   FTE   FTE   GANTT

↑ Name	Current Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23
▸ 🗎 *Business Architect	0.25	0.25	0.25	0.25	0.25	0.25	0.25	-	-	-	-	-	-	-
▸ Amy Jacobs ⓘ	0.35	0.25	0.23	0.2	0.37	0.36	0.46	0.24	0.33	0.38	0.4	0.4	0.19	0.53
▸ Audrey Clarkson ⓘ	0.55	0.55	0.8	0.21	0.39	-	0.3	0.17	0.37	0.2	0.36	0.48	0.34	0.44
▸ Charles Dowd	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
▸ Diane Metcalfe	0.23	0.32	0.32	0.45	0.44	0.55	0.15	0.25	0.25	0.55	0.3	0.36	0.44	0.45
▸ FP Mechanical Team (4 people)	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.05	-	-
▸ FP Technology Team (3 people)	-	-	-	-	-	-	0.25	0.25	0.25	0.25	0.25	0.25	0.25	0.25
▸ Louise Shaw	0.29	0.47	0.32	0.32	0.36	0.12	0.12	0.12	0.12	0.22	0.46	0.55	0.55	0.42
▸ Melanie Peters	0.32	0.2	0.2	0.41	0.32	0.34	0.53	0.3	0.44	0.31	0.3	0.2	0.26	0.35
▸ Owen James	0.29	0.4	0.42	0.32	0.32	0.32	0.32	0.32	0.32	0.3	0.54	0.51	0.36	0.3
▸ Peter Jordan	0.41	0.54	0.37	0.36	0.46	0.25	0.15	0.15	0.15	0.1	0.1	0.1	0.1	0.1
▸ Sara Simmons	0.4	0.54	0.54	0.43	0.29	0.47	0.39	0.47	0.57	0.54	0.51	0.51	0.49	0.48
▸ SL Electrical Team (6 people)	-	-	-	-	-	-	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Total	3.68	4.13	4.04	3.56	3.78	3.25	3.9	3.26	3.79	3.85	4.23	3.91	3.48	3.82

Shirt-Size Initiatives:
% Roles/Teams/People, Dependencies

Assigning Resources by % in a Single Excel-like View Simplifies Planning

Resource↑	Initiative	Feature/Task	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23
Emma Mackenzie	Hypersonics 2025	Determine release terms	27%	48%	25%	32%	43%	26%	10%	10%	37
Emma Mackenzie	Hypersonics 3 Build Team	Complete Risk Tolerance Assessment	24%	41%	29%	33%	49%	43%	10%	10%	64
Emma Mackenzie	Precision Fires 2	Complete Risk Tolerance Assessment	56%	20%	47%	22%	41%	29%	34%	49%	43
Eric Ramos	Assets Database Design Phase …	Stage 2: Definition	24%	35%	37%	48%	50%	48%	39%	47%	50
Eric Ramos	Internal Web Page Build Epic	Post implementation review complete	25%	28%	43%	49%	55%	54%	49%	55%	
Eric Ramos	Metamaterials 2	Post implementation review complete	58%	31%	52%	36%	25%	52%	22%	35%	45
Eric Ramos	Prelude Phase 13	Determine release terms	46%	31%	38%	39%	52%	30%	51%	27%	40
Evan Ruiz	Malibu Phase 12	Review marketing plan for campaign budget	65%	69%	21%	55%	23%	36%	28%	20%	26
Evan Ruiz	Voyager Phase 16	Deliver Training	49%	57%	45%	36%	26%	36%	30%	49%	55
Faith Young	Indigo Phase 8	Current Position Analysis Complete	33%	53%	23%	31%	19%	26%	33%	31%	29
Faith Young	Phoenix Phase 15	Select vendor for appropriate production …	35%	19%	48%	37%	35%	43%	32%	55%	27
Faith Young	Romeo Phase 5	Identify campaign leads	41%	47%	35%	48%	29%	43%	48%	36%	49
Felicity Glover	Prelude Phase 13	Identify targets for each campaign	42%	21%	47%	55%	30%	48%	35%	45%	47
FP Civil Team (3 people)	Hypersonics 2	Generic	24%	10%	10%	10%	10%	-	-	-	
FP Civil Team (3 people)	Hypersonics 2025	Generic	24%	10%	10%	2%	10%	50%	50%	50%	50
FP Civil Team (3 people)	KTLO Federal Platforms	Generic	10%	10%	10%	10%	10%	10%	10%	10%	10
FP Civil Team (3 people)	Metamaterials 1	Generic	-	-	-	-	10%	-	-	-	29
FP Civil Team (3 people)	Metamaterials Project 9	Generic	27%	27%	27%	27%	10%	-	-	-	
FP Mechanical Team (4 people)	Hypersonics 2	Generic	30%	30%	30%	30%	10%	-	-	-	
FP Mechanical Team (4 people)	Hypersonics 2025	Generic	30%	30%	30%	30%	10%	-	-	-	
FP Mechanical Team (4 people)	Hypersonics Project	Generic	50%	50%	50%	50%	10%	50%	50%	50%	50
FP Mechanical Team (4 people)	KTLO Federal Platforms	Generic	20%	20%	20%	20%	10%	20%	20%	20%	20

Integrations Can Improve Data Quality & User Adoption

Unify Data from Various Source Systems
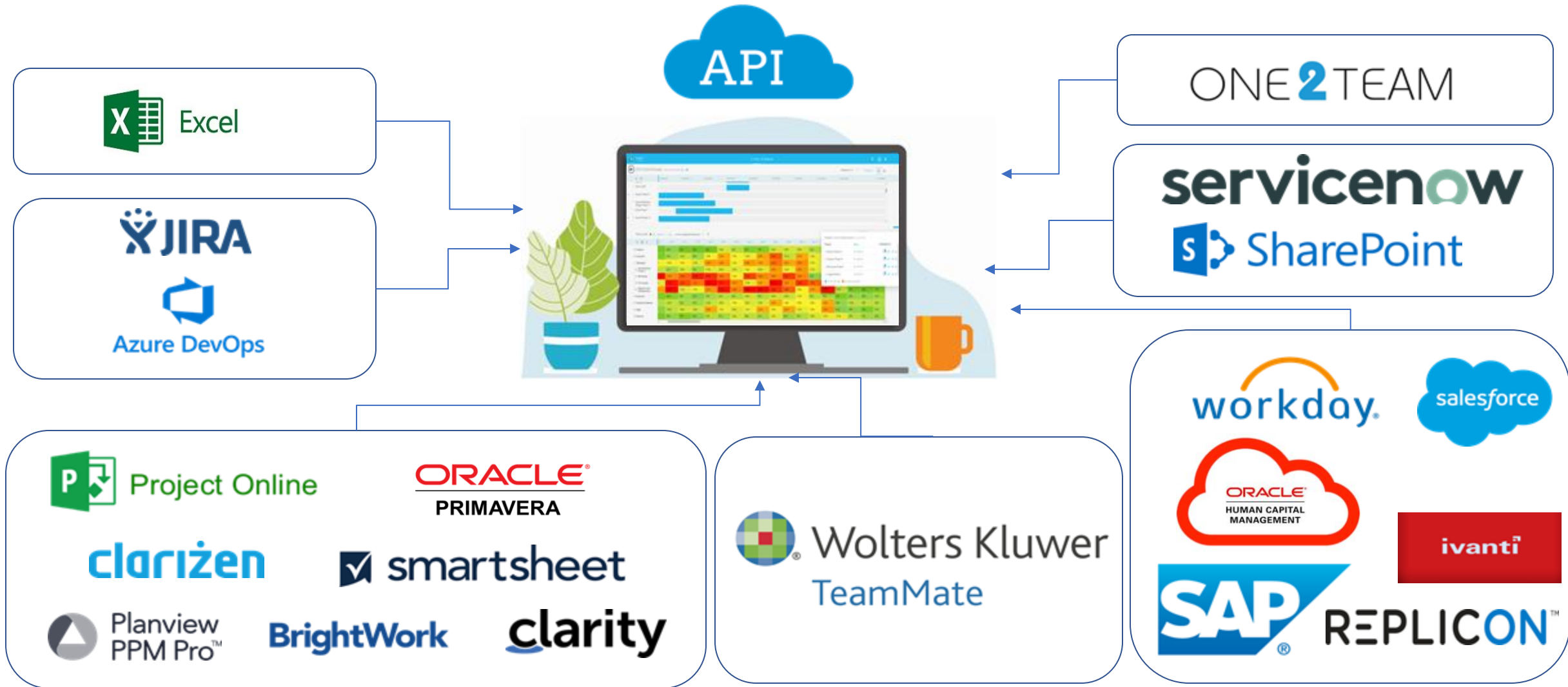
STRATEGIZE: Model Best Strategic Delivery *Within Talent Guardrails*

"*Never sacrifice what you want the most for what you want at the moment.*"   -Neal A. Maxwell


- *Interactively* mitigate delivery & retention risks
- Coordinate delivery & availability *across all initiatives*
- Model scenarios *without impacting production data*

See impact on teams, roles, people, financials, & all portfolio guardrails *in real time*

Evaluate How Strategic Options Will Affect Talent, Delivery, Financials, etc.

"HR can also drive workforce planning by reviewing how disruptive trends affect employees, identifying future core capabilities, and *assessing how supply and demand apply to future skills gaps.*"
                                                                                -McKinsey 2021

Aligning Roadmaps to *Your* Strategic Delivery Model Reserves Resources

Product & Program Roadmaps Now Show What Can Be Delivered Without Talent Burnout!
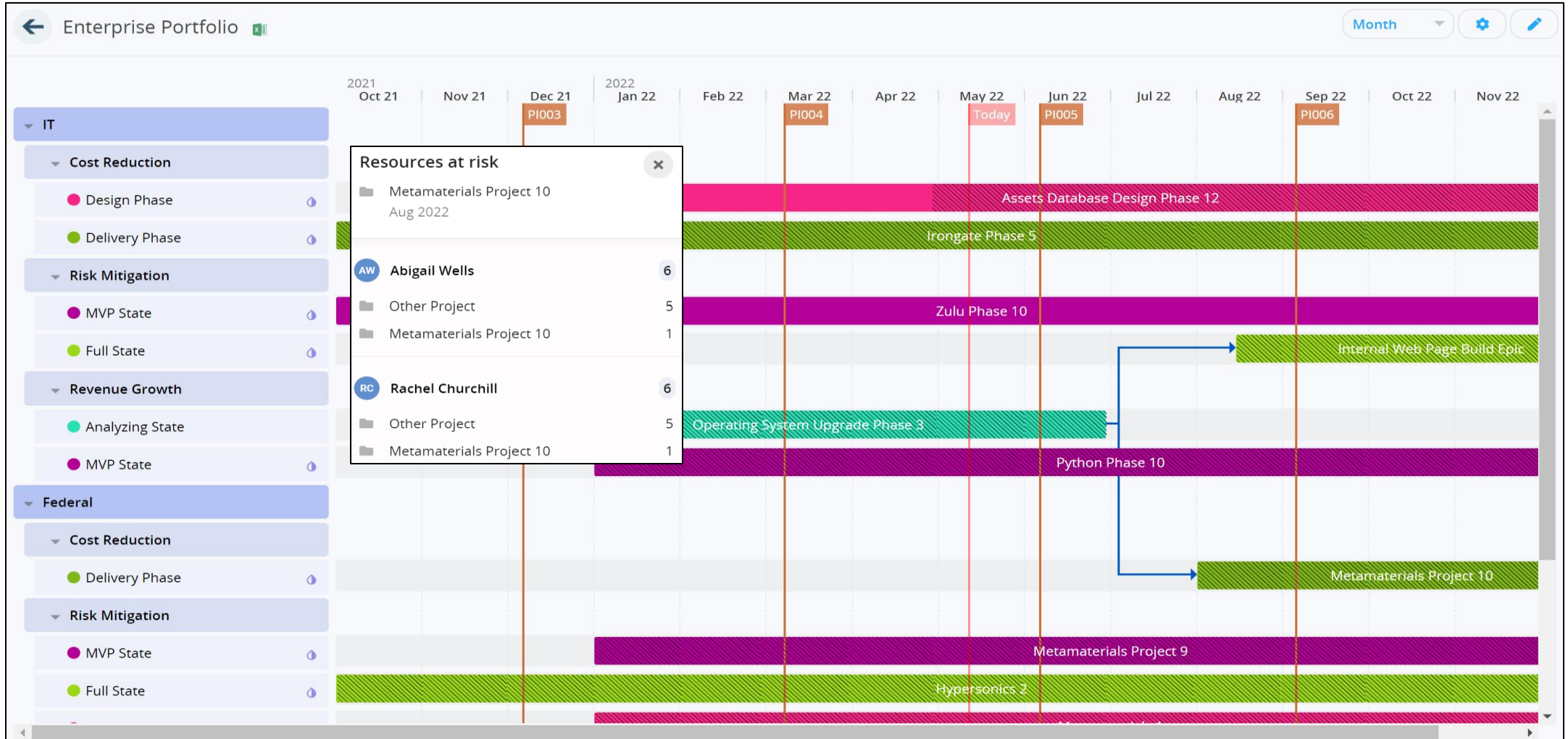
Budgets & Financials

Quickly identify capital vs. expense by adding attributes to financials. Outcome & benefits realization reporting.
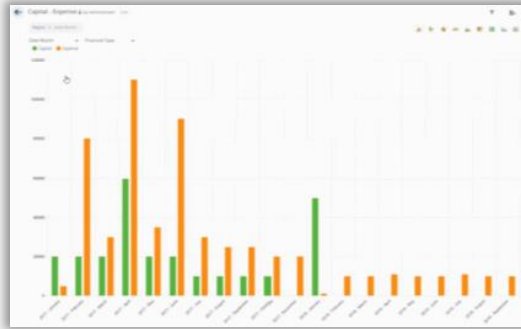
Time Tracking

Track planned against actual using an ultra-flexible time sheet capability. Time can be entered by hours, FTE, %FTE or person day. Enter hours by task or initiative.
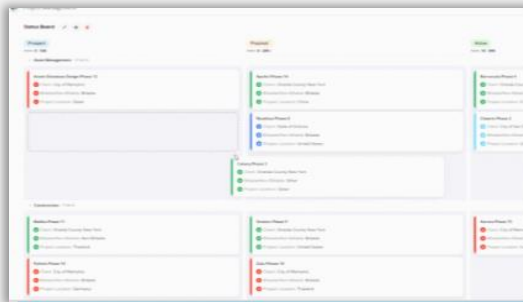

Resource Request Workflow

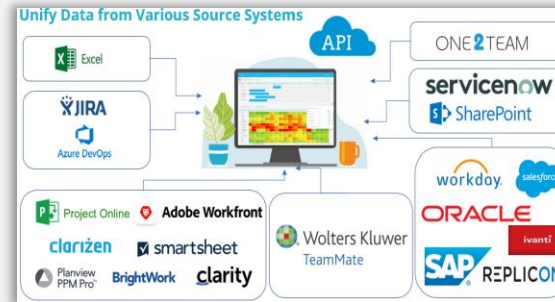*Review, approve, or reject requests. Replace by person or skills. Use as needed for specific resources.*

Portfolio Kanban

Track your portfolio using dynamic interactive Kanban views. Kanban boards made from any custom attribute.

Enterprise Integrations

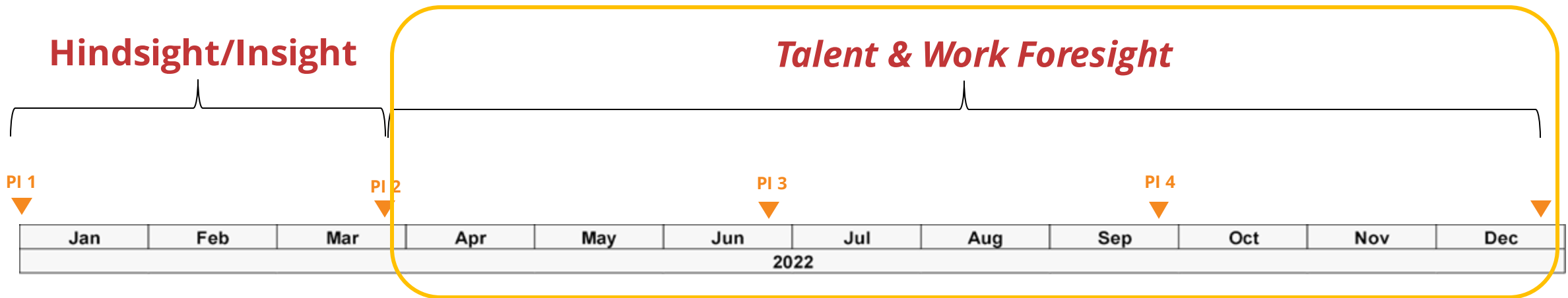*Out of the box connectors and an API facilitate data integration from numerous source systems.*

Skills Matrix

Easy to use Skills Matrix module with security, validation and reporting.

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Foresight Sustains Adaptable Strategic Delivery

Hindsight/Insight

Talent & Work Foresight

PI 1   PI 2   PI 3   PI 4

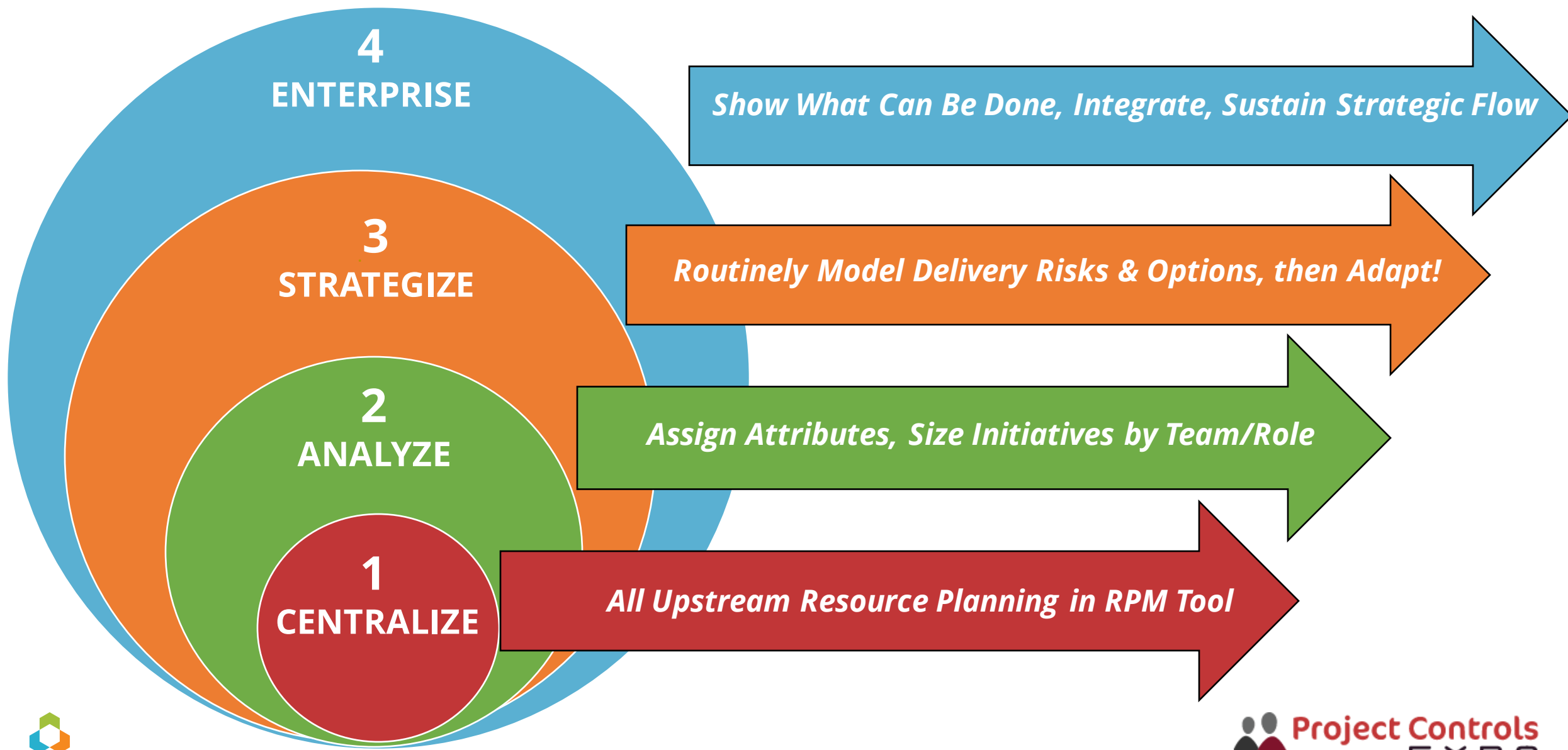| Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
						2022					

- Realistic delivery & risk expectations
- Predictable & adaptive strategic delivery
- Talent retention designed into planning
- Roadmaps show what can be delivered
- Easy adoption and business integration

"Organizations that can reallocate talent in step with their strategic plans are more than twice as likely to outperform their peers"
– McKinsey & Co. 2022

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The C.A.S.E. for Predictable, Adaptable, Sustainable, Strategic Delivery

4 ENTERPRISE

3 STRATEGIZE

2 ANALYZE

1 CENTRALIZE

Show What Can Be Done, Integrate, Sustain Strategic Flow

Routinely Model Delivery Risks & Options, then Adapt!

Assign Attributes, Size Initiatives by Team/Role

All Upstream Resource Planning in RPM Tool

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Questions?

To continue the conversation,
reach out to us at:

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Or

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Available 30-day Trials

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Recognized in the 2022
Gartner® Magic Quadrant™
for Adaptive Project
Management and Reporting

Recognized in the 2022
Gartner® Critical Capabilities
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