

4-6 October, Nationals Park, Washington DC



Optimizing Strategic Delivery & Adaptability Thru Effective Resource Planning

Greg Bailey, VP Resource Planning-Prosymmetry

 **Project Controls**
EXPO
Washington, DC - USA


TempusResource
by ProSymmetry

(W)www.projectcontrolexpo.com/usa (M) +44 (0) 203 883 1386 (E)usa@projectcontrolexpo.com

2022

Optimize Strategic Delivery, Adaptability, and Talent Retention



Technology

CPG/Manufacturing

Insurance

Healthcare

Energy, Utility, Defense/Space

Misc

Agency

Prof Serv

Misc

Agency

Prof Serv

Financial

Financial

Financial

“Everyone has a plan until they get punched in the mouth”

-Mike Tyson



Quickly & confidently answer the resource questions organizations ask when adapting delivery:



- 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?

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

88% of highly engaged employees agree they will be at their organization in a year, compared to 49% of disengaged employees

-Quantum Workplace

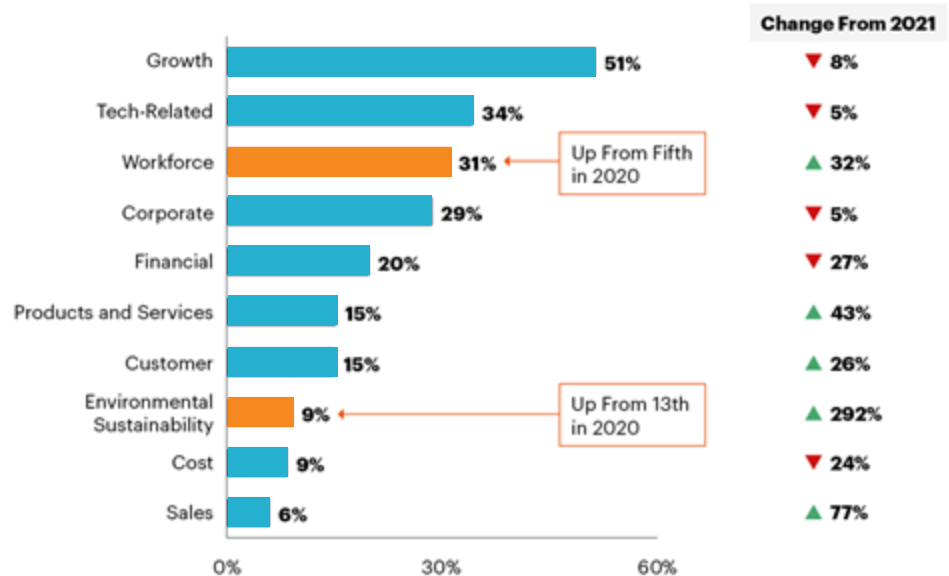
Replacing exiting workers costs one half to two times the employee's annual salary

-2021 by Gallup



CEOs' Top 10 Strategic Business Priority Areas for 2022-2023

Summary Top Three Mentions, Coded Responses



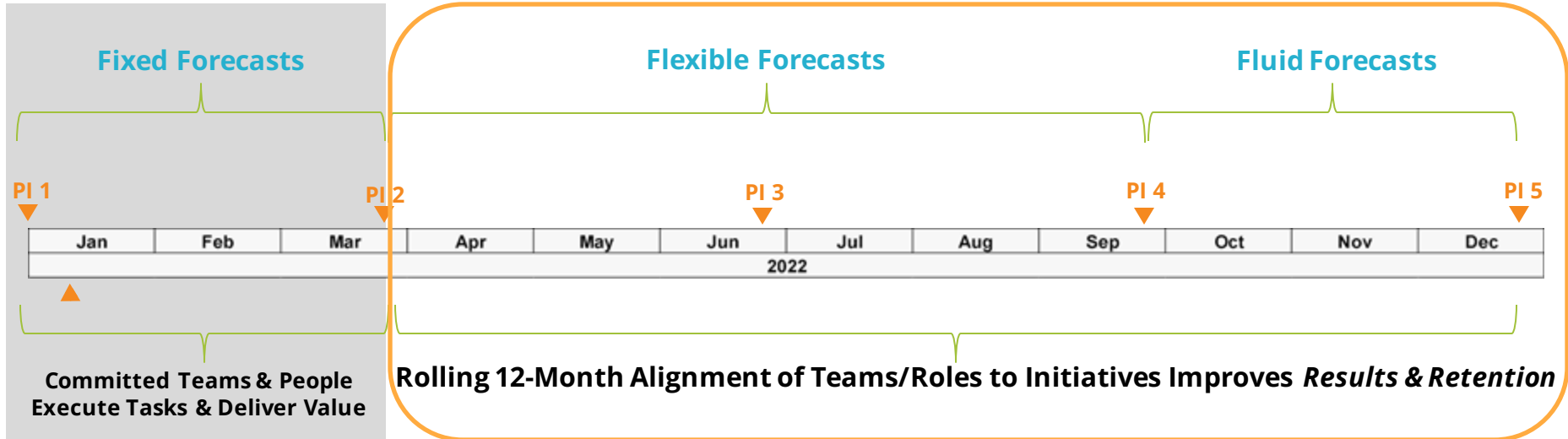
n = 410, all respondents

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

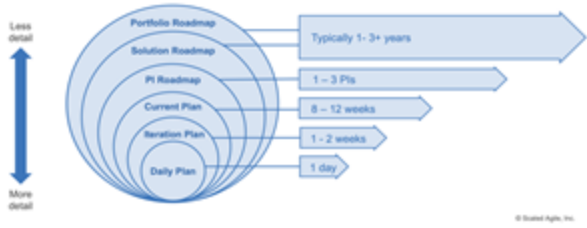
766731_C

Early Upstream Alignment Promotes Predictable Delivery

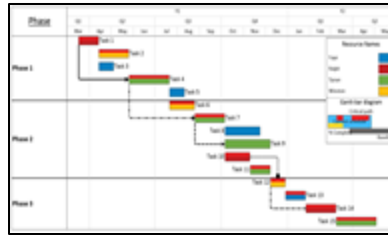


3 to 6 months on average to hire & onboard new talent
-Resource Management Institute 2022

CENTRALIZE Upstream Roadmap & Resource Planning to Enable Adaptive Delivery



Agile Initiatives:
12-Month Product Roadmaps



Waterfall Projects
Program & Portfolio Roadmaps



Operations Work:
12-month Staff Planning Roadmaps



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	Accounting 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

Teams & People:
Role, Capacity, Organization, Rate

NAME	PORTFOLIO	RANK	KANBAN STATE	PRIORITY	SENIOR LEADER
George Barracuda Phase 9	Commercial	1	Delivery Phase	↑High	Cameron Paige
Harold Bender Phase 1	Regulatory & Risk	2	Analyzing	↑High	Trevor Harrison
Heather SOX 2 Review	Regulatory & Risk	3	MVP Implementation	↑High	
Helen Aurora Phase 15	State & Local	4	Backlog	↑High	Cameron Paige
Assets Database Design Phase 12	IT	5	Design Phase	↑High	Trevor Harrison

Initiatives:
Priority, Program, Strategic Theme

Hypersonics Project		Start date	End date	Allocation	Demand	Attributes	Allocations								
		01/01/2022	07/04/2024				Planned								
		Resource	Feature/Task	Options	Choose attributes	Initiative	Quarter	Month	Week	Day	TIME	COST	FTE	FTE	GANTT
1 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	0.3	0.41	0.32	0.34	0.53	0.3	0.44	0.31	0.3	0.2	0.26	0.38	
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

Editing All Assignments in a Single Excel-like View Simplifies Planning



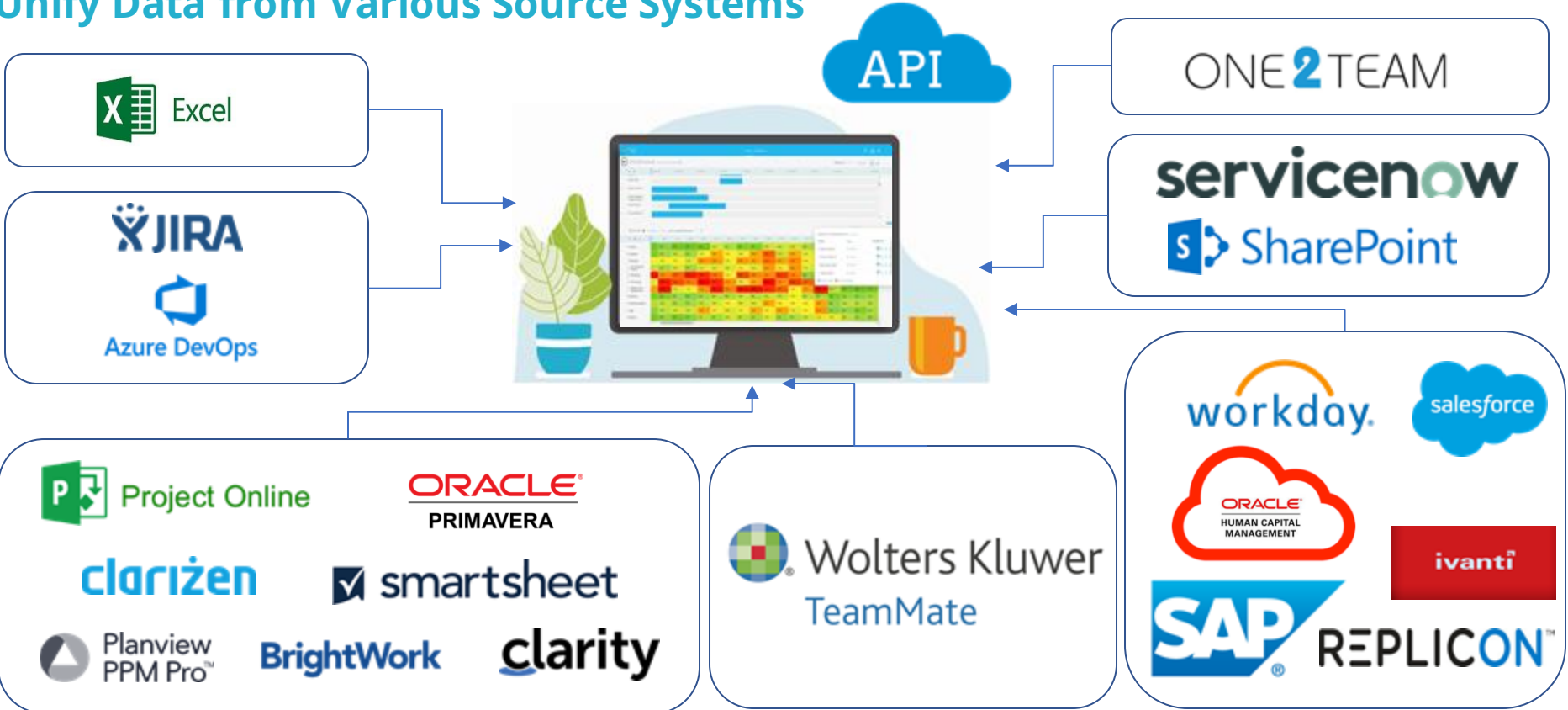
Assign Values Save Release + 📄

Options Choose attributes Month TIME COST FTE FTE

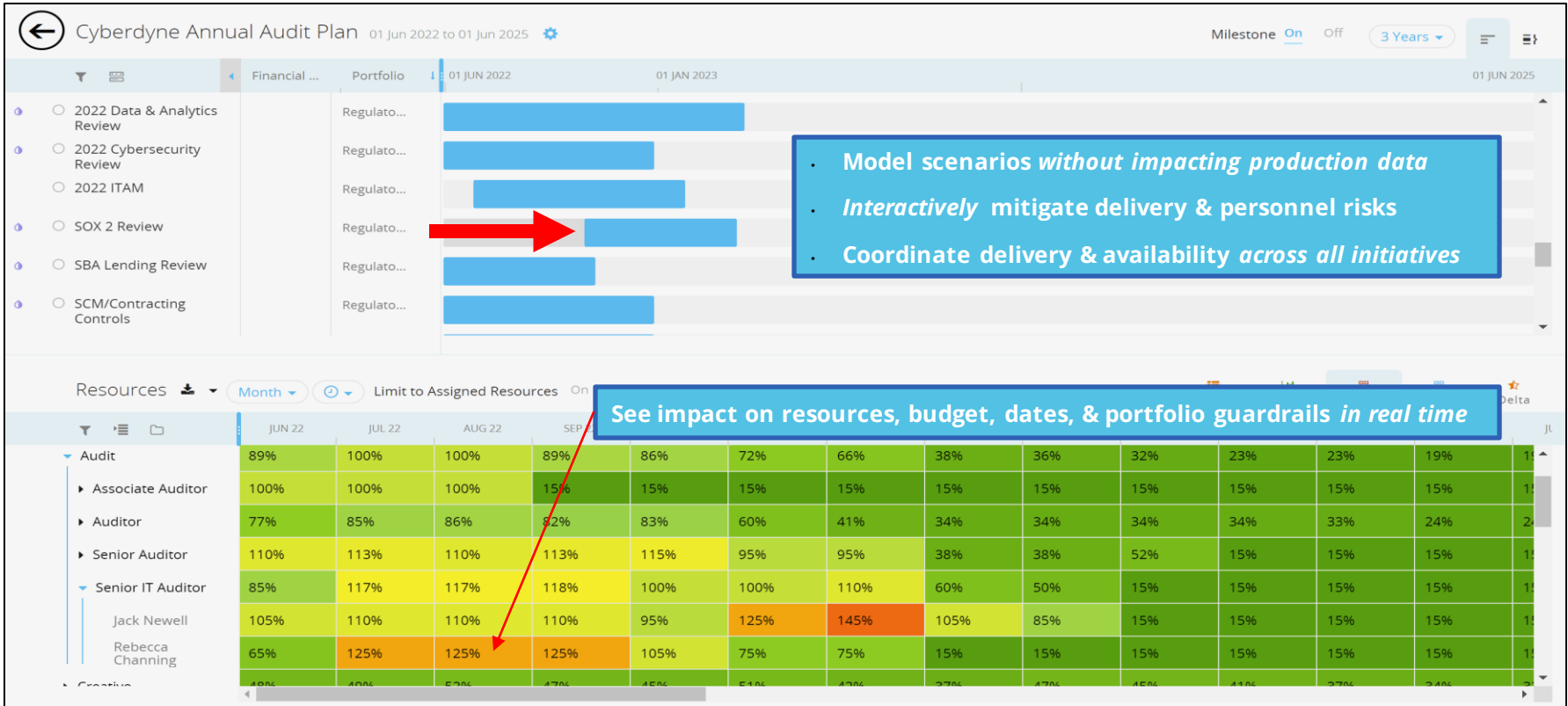
Resource	Initiative	Feature/Task	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23
Emma Mackenzie	Hypersonics 2025	Determine release terms	27%	48%	25%	32%	43%	26%	10%	10%	37%
Emma Mackenzie	Hypersonics 3 Build Team	Complete Risk Tolerance Assessment	24%	41%	29%	33%	49%	43%	10%	10%	64%
Emma 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%

Enterprise Integration

Unify Data from Various Source Systems



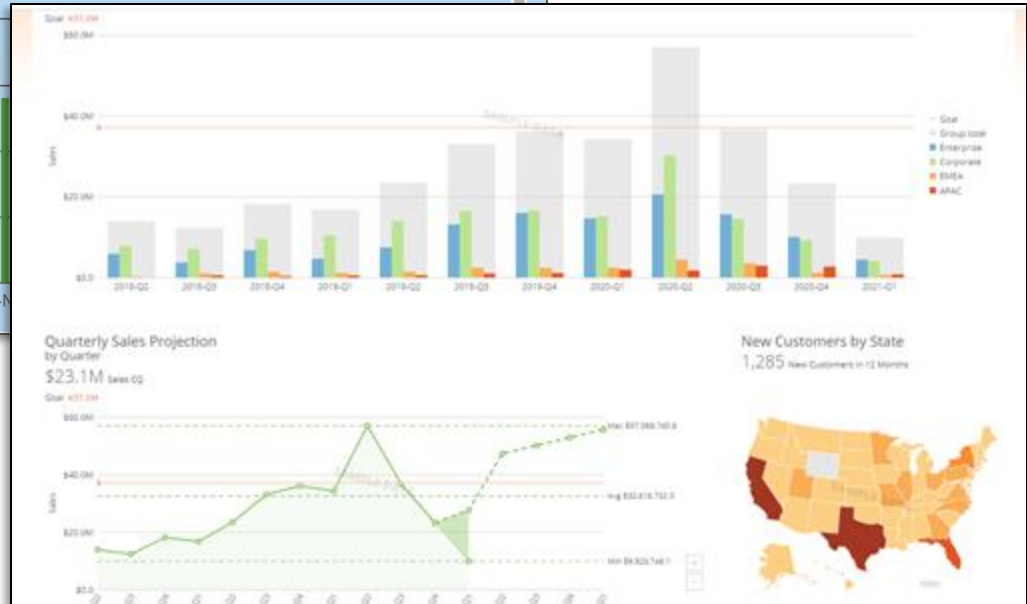
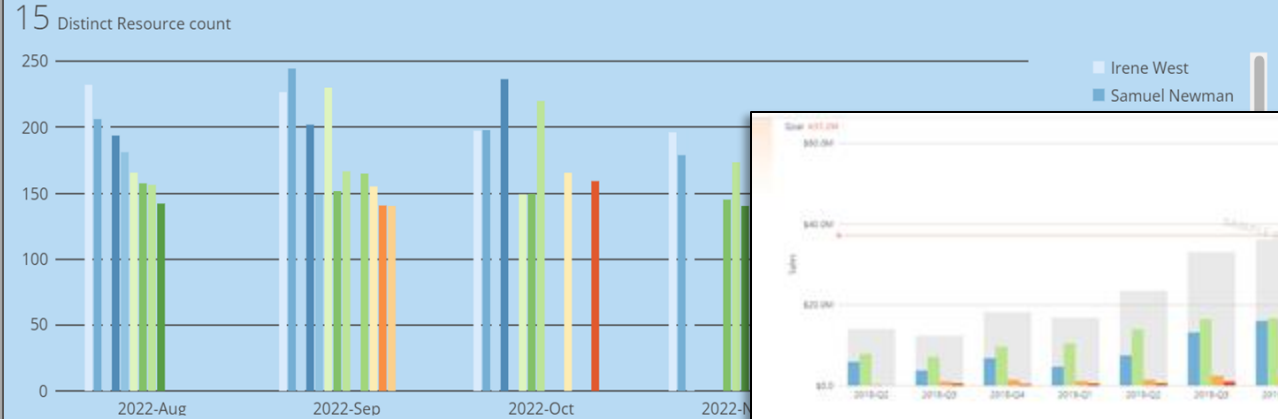
STRATEGIZE: Model Best Ways to Adapt to Changing Business Conditions



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



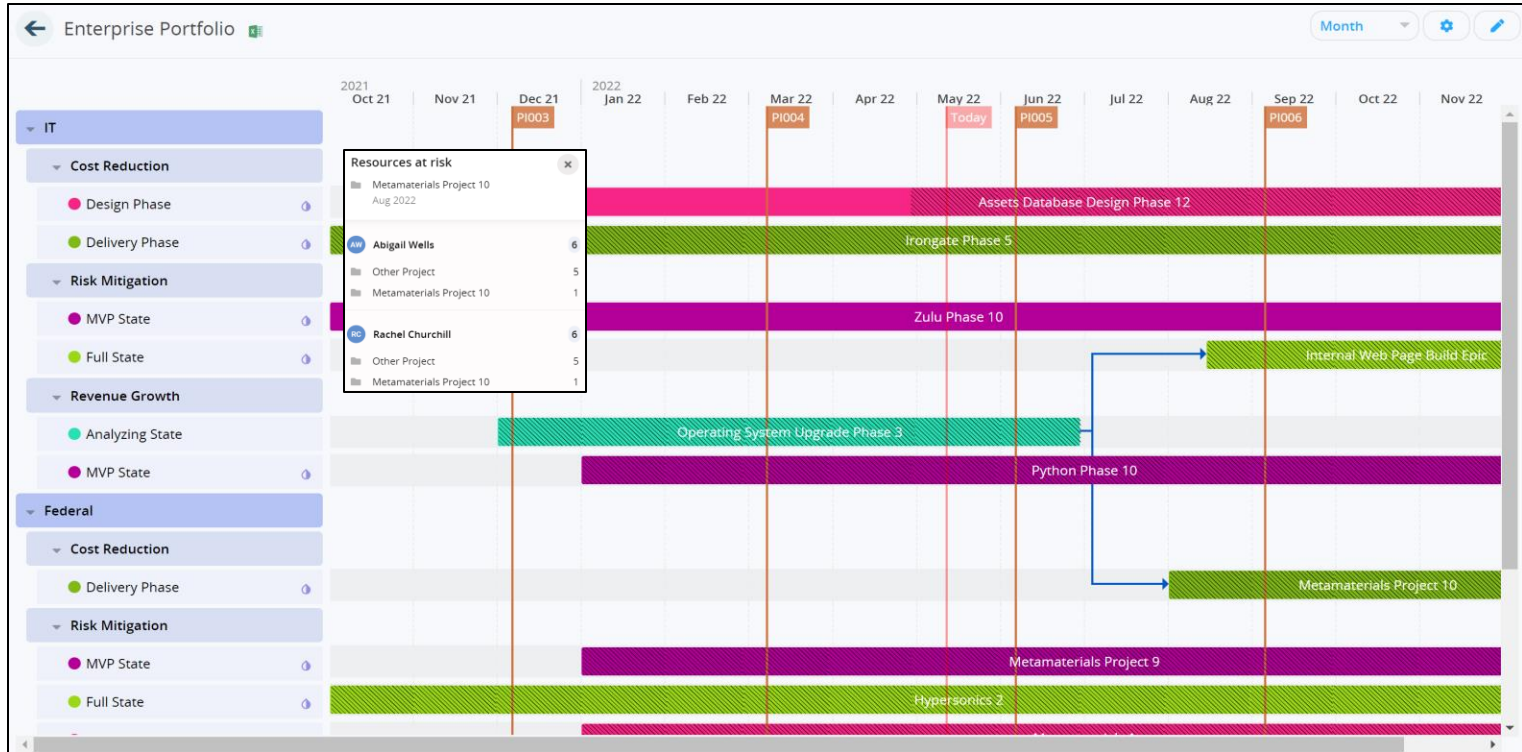
Overallocated resources (> 140%)
by Month



Capacity-Driven Roadmaps Show What Can Be Delivered



Align Product & Program Roadmaps to Strategic Delivery Model to Reserve Resources

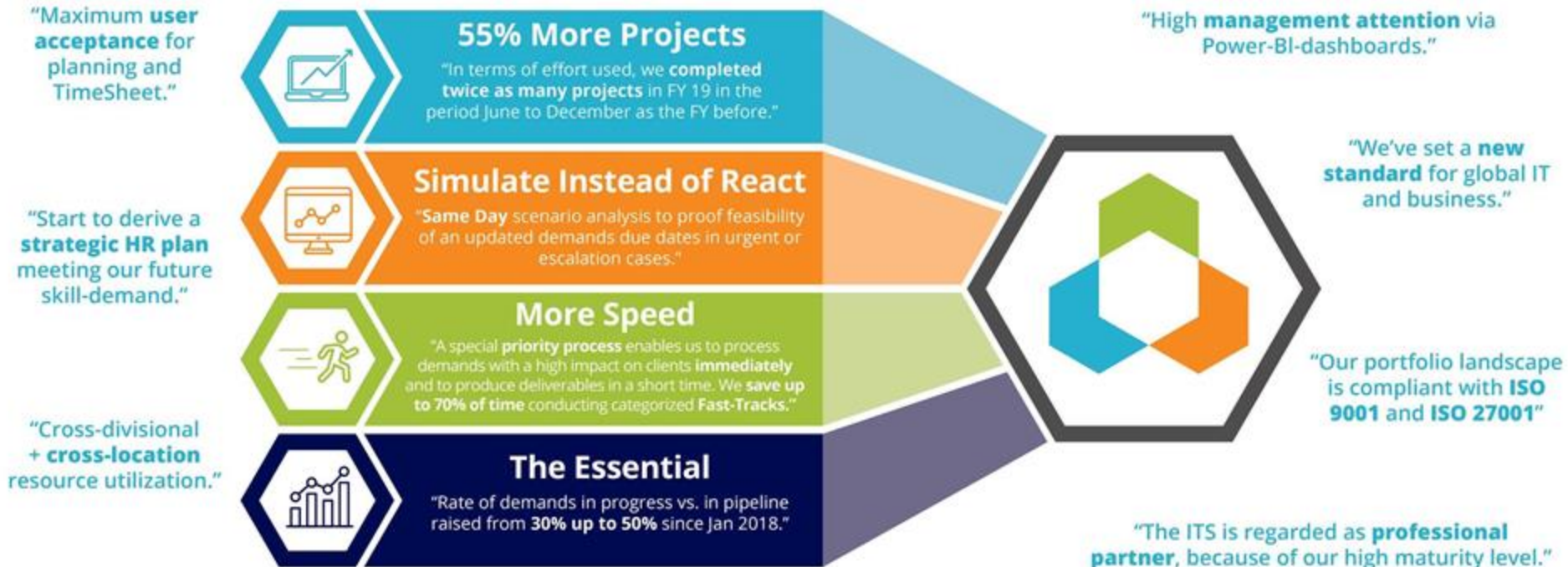


Deloitte: Resource Portfolio Management Benefits



Measurable Benefits for Deloitte

Transforming from PPM to RPM in the first year

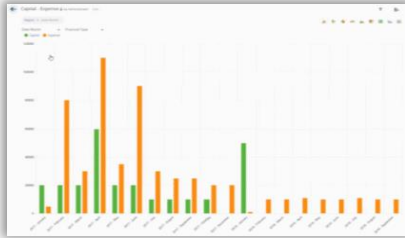


HARMONIZE: Lightweight Process Sustains Predictable and Adaptive Delivery



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.



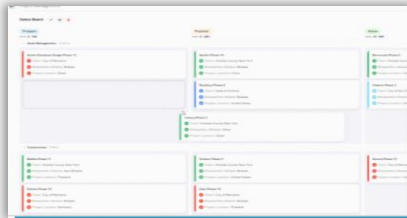
Resource Request Workflow

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



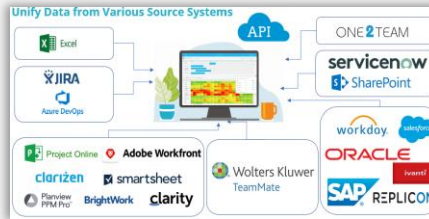
Portfolio Kanban

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



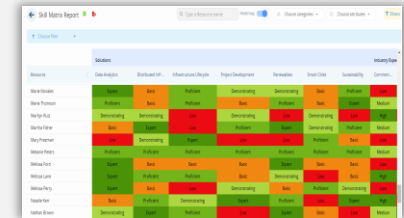
Enterprise Integrations

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.



Strategic Benefits of Resource Portfolio Management



Hindsight/Insight

Foresight

PI 1

PI 2

PI 3

PI 4

PI 5

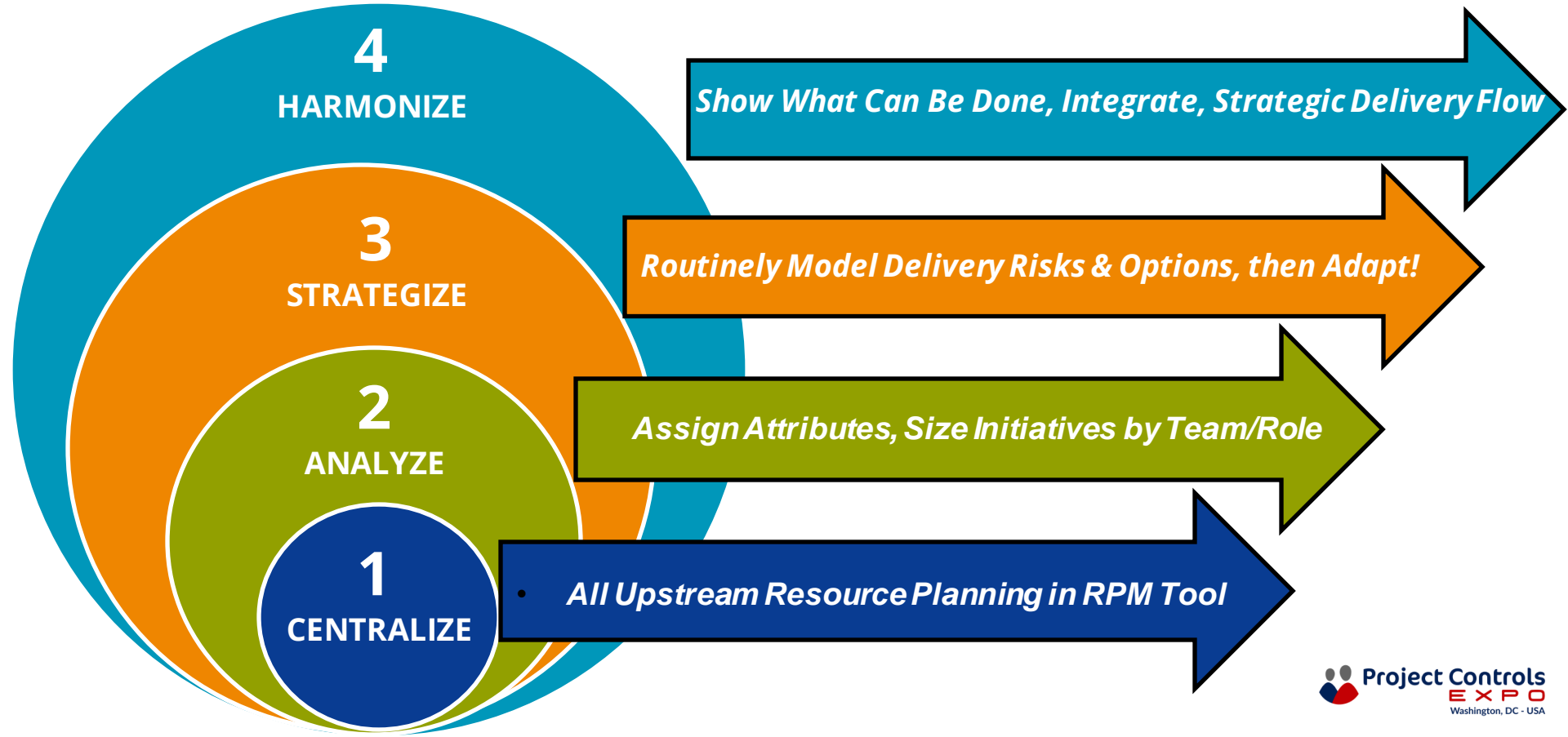
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

2022

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

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

Next Steps to Predictable and Adaptable Delivery Benefits





TempusResource
by ProSymmetry

THANK YOU

Questions?

To continue the conversation,
reach out to me at:
gbailey@prosymmetry.com

Or

Visit Us in the Exhibit Hall
Available 30-day Trials

