



5 WAYS TO WIN THE RESOURCE MANAGEMENT GAME



 **LiquidPlanner**[®]

Table of Contents



Introduction

3



Allocating resources

4



Resource leveling

9



Know who's doing what

12



Track project progress

16



Future forecasting:
capacity and demand

20



Contact us

23

Resource management is a many-headed beast.



Pick any popular project methodology or process you like, and one of the biggest deciders of project success comes down to how effectively you manage your resources. Misallocate your people, overshoot your budget, and you're in big trouble. Do it right, and you're a hero.

In multi-project organizations, resources are typically fully work-loaded, assigned to a range of projects and tasks with little or no breathing space in between. Then more work arrives, which has to be shoe-horned into the plan without overheating schedules and overloading people. Something has to give—delivery dates, budgets, schedules—not exactly a recipe for project or professional success.

But it doesn't have to be this way! Managing your resources can be an integrated part of your project planning and scheduling process—before and during the life of a project. Which means you can do a few things at once: plan for the future, manage the present, anticipate risks, and prepare for changes and uncertainty. All of this translates to delivering a high-quality project on time and within budget.

In this white paper we're going to:

- ✦ Address common resource management challenges.
- ✦ Provide solutions for managing people and money resources, and integrating them into your project schedule
- ✦ Show you how LiquidPlanner, a resource-driven project management tool, supports all these important resource management solutions.



Allocating resources

Set up a resource pool. Establish availability and cost. Assign work.

Manager 1: "Can I borrow Tim for the next couple of weeks to help out the design team? He told me he has some free time."

Manager 2: "My schedule says that he's booked. And his name's Tom."

The challenge

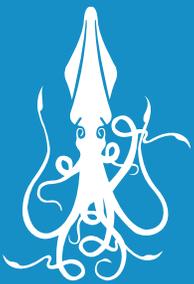
Allocating resources effectively and accurately is one of the biggest challenges going into any project. No team is going to have a smooth project experience when the project managers don't know how their team members and budgets have been allocated.

One of the big problems project teams face is that there's no shared location that shows how and where resources are deployed. Plus, there isn't the right data associated with each resource. So the act of allocating resources becomes a very non-scientific guessing game—bad for the project and bad for business.

What matters

What you need is a system, or process, that shows you where and how your resources are allocated through the lifecycle of your project—from the planning phases all the way to delivery. This way you can steer your team and their work through obstacles and change requests as they come up—adding and subtracting resources as needed. Having insight into how your resources are allocated lets you respond quickly, make strategic decisions, and keep stakeholders updated when those unforeseeable project risks and uncertainties make themselves known. All of this raises your chances of delivering projects when you say you will. And that's good for business.

ALLOCATING
RESOURCES



What works

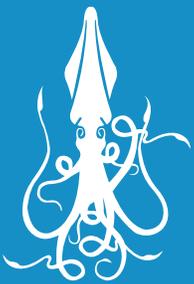
One of the most effective ways to allocate resources is by using a collaborative project management tool. And then, ideally, you want a platform that integrates resource management into the scheduler, and lets you set up the cost of services going out and coming in for all team members. This means that all of your project schedules would be based on accurate resource availability, and as schedules change you can immediately see the budget impact.

Set up a centralized resource pool.

First, you want to establish a single, centralized, shared resource pool in which all plans and schedules are based. When doing so, include the following two important pieces of information for everyone who's using your project management tool: cost of use and availability.

- ✦ **Cost of use.** After you set up your resource pool, give a monetary amount on everything that's going out and coming in. When you allocate cost of use for every person working on the project, you can see if you're running over or under budget on your projects.
- ✦ **Availability.** To have a realistic view of your team's availability, start by establishing how many hours a day or week each team member is really available for project work. And remember: Even when resources are allocated full-time to a project, they'll rarely spend all their time working on it, as they'll have non-project demands on their time. And even our superstars can't be in two places at once or work 24/7/365; so be realistic if you want to avoid overly optimistic scheduling—and burnt out employees.

ALLOCATING
RESOURCES



Using LiquidPlanner to allocate resources

LiquidPlanner's resource-driven scheduling engine automatically adjusts task start dates according to every team member's availability—including vacation, holidays, recurring events, etc.

Here are some ways LiquidPlanner helps you manage resource allocation:

- ✦ **Availability:** Everyone has a default setting of eight hours of availability in their profile setting. Individuals can reset their hours to reflect their available project hours outside of other activities such as meetings, going on sales calls, taking Wednesdays off, etc. The scheduling engine always considers these figures when updating your plan.
- ✦ **Cost of use:** LiquidPlanner lets you set Pay Rules and Billing Rules for all project work and team members. This way, you can see how much you're paying out for each resource and how much you're bringing in. So you don't just get the *who's who* for your project, you also get the most valuable *how much*.

My Settings for GameFX Team

Team:

External ID:

This ID is included in your timesheet export data.

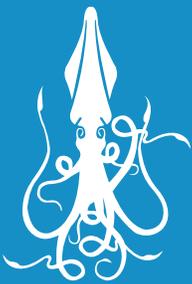
Availability (hours):

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.0	7.0	4.0	4.0	7.0	0.0	0.0

Overdrive Scheduling - for modeling work done outside your team. ([Explain](#))

Daily start: : Personal Default Activity: ([Explain](#))

ALLOCATING
RESOURCES



Once this information is set up, the numbers are automatically calculated for work done and work remaining. This can then be included in your financial metrics based on data entered by the team.

Project	Hrs Total [E] ▼	\$ Pay Total [E]	\$ Pay Remaining [E]	\$ Total Billable [E]	\$ Delta Bill vs Pay
Logic Blox Mobile App v2.2	185.88	\$9370.00	\$9370.00	\$18138.33	\$8768.33
Corpsite Wireframe	155.00	\$7750.00	\$7750.00	\$15500.00	\$7750.00
Social Selling Platform	151.50	\$7575.00	\$7575.00	\$9150.00	\$1575.00
Gamespace Pro II Launch	110.67	\$5533.33	\$5533.33	\$6566.67	\$1033.33
Site Re-design	75.25	\$3762.50	\$3762.50	\$8843.75	\$5081.25
Super SliderZ	59.18	\$2959.17	\$2959.17	\$5393.33	\$2434.17

Assign work.

It's a simple thing, assigning work—or so you'd think. But how often does someone assign work by saying, "Hey Tom, can you take on this task?"—then stashes that information in a spreadsheet and hope for the best? The results aren't optimal.

To be an affective resource allocator, you need to account for all the work being done, i.e., put names to every task, and make sure that work is distributed. In other words, no task that has been approved should remain unassigned. Part of managing resources effectively is making sure that all team members know what their expectations and priorities are, exactly what needs to be accomplished, and who's responsible for getting which tasks done.

ALLOCATING RESOURCES





Resource leveling

Don't over-commit your resources. Know your priorities.

Manager: "Can you jump on this task Tom? It's our #1 priority."

Tom: "Sure. Do you want it done before or after the other #1 priorities?"

The challenge

Effective project leads don't fire tasks out in scattergun style, announce everything as the number-one priority and see what happens. When team members are over-assigned, and aren't clear on what their priorities are, productivity and morale tanks. And let's not talk about budget overruns that happen with this shoot-from-the-hip planning style. In short, when you don't have a resource leveling process in place, you have no way to control how and if your project comes in on time and on budget.

What matters

Resource levelling is the necessary process of balancing the workload of your resources (people, budgets, materials, etc.) over the course of a project. The right project management tool will calculate every team member's schedule by looking at what needs to be done, how it's prioritized, and their availability to complete the work that's been assigned. Using this type of tool means you always have an updated view into how your time, cost and scope aligns with your start and finish dates. Plus, everyone on the team has clear expectations on their priorities every single day.

RESOURCE
LEVELING



What works

Let's say you have all of your current and future projects set up, assigned and prioritized in your project management tool. Change requests can happen fast, so updates have to be easy. You need know where you stand every time you go into your project plan and make any necessary changes.

As the project gets underway and changes inevitably occur, you'll probably need to reprioritize some of the work items. Resource leveling is a way to continue updating your project in a way that makes sure resources are being used as effectively and accurately as possible, no matter what the project scenario might be.

Using LiquidPlanner for resource leveling

LiquidPlanner is a priority-driven scheduling engine that takes a resource's availability and workload into account when calculating start and finish dates. Consequently, a LiquidPlanner schedule is always resource leveled. Project leaders still have to identify task dependencies like in any other system, but that's just good schedule development. LiquidPlanner automatically balances the work assigned to team members. All you have to do is:

- ✿ Add your tasks.
- ✿ Provide best/worst case effort estimates.
- ✿ Assign a team member, or have them assign themselves to the task.
- ✿ Repeat.

▼ Planning (3)		Log Your Progress		Work Independently ▼		Convert ▼	
<input type="checkbox"/> Done	<input type="checkbox"/> On Hold	Delay Until None		Deadline None			
Done	Owner	Logged	Remaining	Expected Activity	Start [E]	Finish [E]	
<input type="checkbox"/>	 Jacin	32.5h	1h - 2h	040 - Project Management	06/23/15	06/24/15	
<input type="checkbox"/>	 Kayvon	1h	1h - 3h	040 - Project Management	06/23/15	06/24/15	
<input checked="" type="checkbox"/>	 [Alison]	6h	Done	040 - Project Management	—	—	
Add People					06/23/15	06/24/15	

RESOURCE LEVELING





Know who's doing what

Get the right view of your project world.

Project manager: "Hey. Remind me who's doing the user documentation updates on your new web project?"

Team member: "It's Alex. No wait – it's Bill. Actually – not sure. Doc? Grumpy? Happy? Snee—"

Project manager: "Yeah don't worry about it. I'll just go ask around."

The challenge

If you're managing multiple projects, or large complex ones, it gets difficult to see which team members are doing what, and when. As a manager, this is something you need to have a detailed grasp of. If not, you're back to herding cats, missing deadlines, adjusting budget overruns and other catastrophes.

What matters

You need the right kind and amount of information on hand at all times, and you need it quickly. You also need a way to deliver filtered project data efficiently. Nobody wants to be weighed down by more details than they need.

For example, project managers will be more concerned with individual tasks, how they're distributed and prioritized. Team leaders and senior management are looking at higher-level stats such as delivery dates, resource distribution, budgets and keeping the client informed of how the project is going.

KEEP TRACK
OF WHO'S
DOING WHAT



What works

You want a project management system that gives you real-time data to track resources, and then lets you filter this information up the chain. When everyone knows the big picture and can see what's coming, the project transforms from being a hell-on-wheels endeavour to one that is filled with illuminating solutions.

Get resource information with LiquidPlanner.

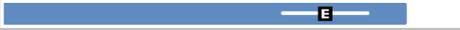
LiquidPlanner's resource management features give you multiple ways to access and filter down to specific resource data. Here's what you can do:

- ✦ Get a quick-scrolling view of who's assigned to every task—in your project and workspace.
- ✦ Filter to a single person or team to see a list of assigned tasks.
- ✦ Filter to all unassigned tasks to see where the gaps are.
- ✦ Get the long view of what your team is working on. See who needs to have work taken off their plate, who's available to take it on, who's making deadlines, etc.
- ✦ View day-by-day work allocation for your team over whatever period you specify to identify risks.

Here are two examples of a long-view of overall workload, and a drilled-down view.

1. A long view of who's doing what, with ranged estimates factored in:

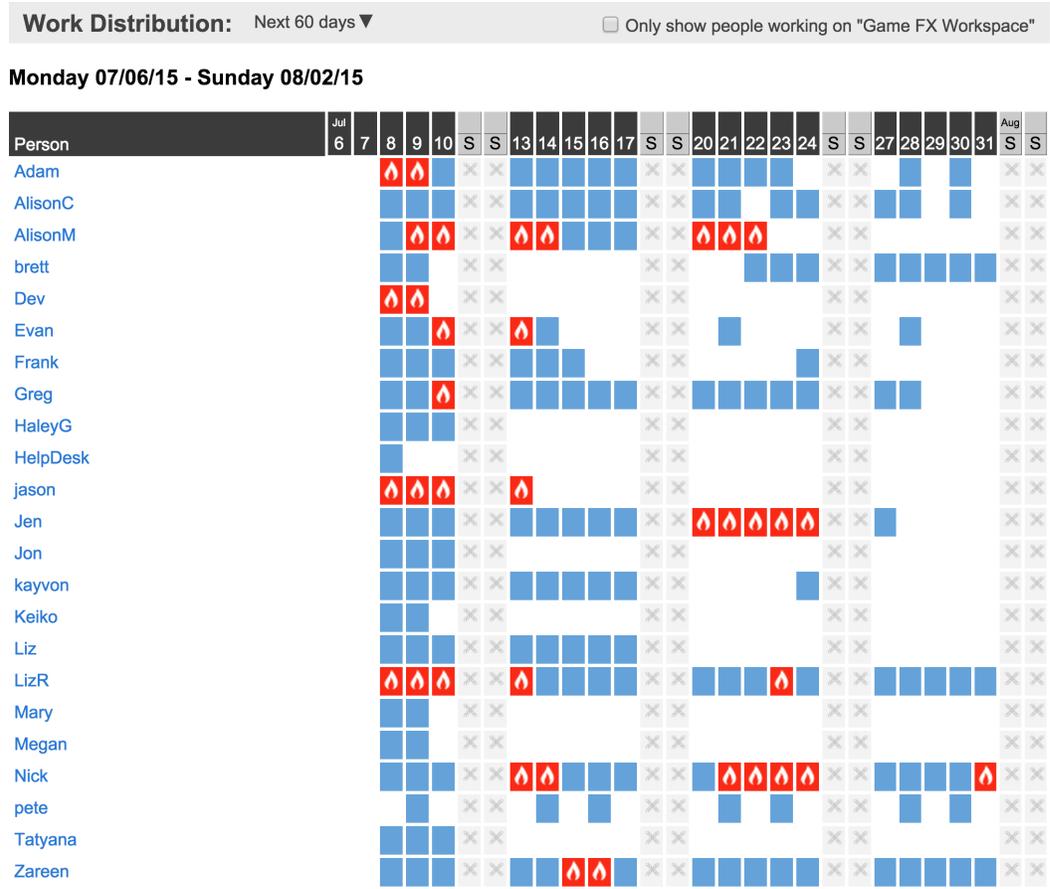
Overall Workload

Person	Low	High	Expected	Work Share ▼	Remaining Work
JenAsh (3)	61.09h	83.91h	72.5h	31.6%	
Evan (2)	56.06h	73.94h	65h	28.3%	
Jacin (1)	40h	48h	44h	19.2%	
Jed (1)	15.52h	31.52h	23.52h	10.2%	
Brett (2)	11.5h	27.5h	19.5h	8.5%	

KEEP TRACK
OF WHO'S
DOING WHAT



2. A drilled-down view of work distribution for a specific project, by day. The blue squares represent the project that the workload report is connected to. The white spaces show availability. The flame shows where risk exists.



KEEP TRACK OF WHO'S DOING WHAT





Track project progress

Take the guesswork out of the work. Have a clear sense of work completed and work remaining.

Project Manager: "How's your work coming along?"

Team Member: "Okay I guess."

Project Manager: "So you're on schedule?"

The challenge

There's a very satisfying point at the start of a project when a plan is in place, the work has been allocated and everyone on the team is raring to go. This is also the point when things get tricky. The challenge now is to stay on a focused, productive and profitable path. If you don't have a way to track the progress of both the work accomplished and what's remaining, you risk mismanaging resources, going over budget and delivering projects late. All of this can spell disaster for your organization, your team and your career. Ouch, right?

What matters

But—when you have the tools to track how resources align with your project's workflow, it's almost like having your own project management crystal ball! You can track progress and forecast work remaining without the guessing, chaos and doubts. Then you have access to reports that show you both the hours worked on cumulative tasks as well as the hours of work remaining—which is gold for anyone managing or leading a project with high stakes.

TRACK
PROJECT
PROGRESS



What works

Having a widely-used time tracking tool is imperative to getting a realistic and updated picture of project progress. Then, you want to regularly review your progress as your project moves forward through all the exciting ups and downs. There are some tricks to the trade here too, for example: Just because a task has used up 50 percent of its original budget, it doesn't mean that it's half complete. The right tool will show you what this scenario looks like.

To set yourself up, you need the following information and tools:

- ✦ A time tracking system that people use
- ✦ An easy way for people to set timers to associated tasks
- ✦ A view of how much time everyone is spending on each task

Get all this data to integrate with your scheduling system, and it's easy to keep track of project progress.

Using LiquidPlanner to track progress

LiquidPlanner makes tracking time a reality in your organization for a couple of reasons:

- ✦ The timesheet is integrated into the scheduling engine.
- ✦ The timers make it easy to track time to all project tasks.

It's vital to have time tracking data in order to allocate, manage and plan resources accurately (or even at all.)

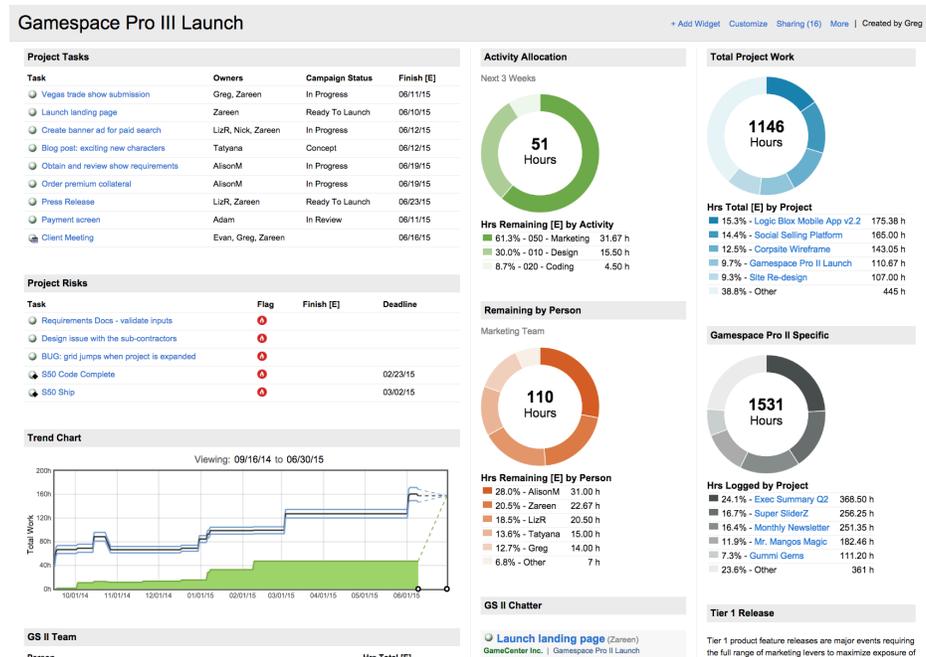
Here are some of the ways that LiquidPlanner helps project managers keep track of their resources throughout the lifecycle of projects:

- ✦ **Timesheets** are fully integrated with the LiquidPlanner project management environment.
- ✦ **Task timers** make it easy to track time as you do the actual work.

TRACK
PROJECT
PROGRESS



- ✦ **Your remaining effort is always current.** Whenever you log progress, the effort of the task is automatically decremented, which also rolls up to the entire project. This means the schedule is always up to date.
- ✦ **Schedule alerts.** LiquidPlanner also provides some visual cues (a fire icon) to alert the team to certain risks that may come into play as a project progresses.
- ✦ **Analytics.** LiquidPlanner provides a huge range of reports that gives you comprehensive information at whatever level of detail you choose—from portfolio to project to task.
- ✦ **Dashboards.** This is a way to share selected analytics for a specific project, initiative, etc. with selected team members and stakeholders. It's a quick way to give a clear visual representation of the key data people need to see. Here's an example of a dashboard that shows project tasks, activity allocation, total project work and more for a new product launch.



TRACK
PROJECT
PROGRESS





Plan the future: capacity and demand

Get the big picture. Know what you can do before you say "Can do!"

Sales manager: "Could you give me a schedule for that GUI update I can pass on to the customer?"

Program Manager: "Sure—just give me a month to update the plan."

The challenge

We've all been there: spent time building out a project plan, prioritizing work and setting up a spider's web of dependencies—only to go back to the drawing board because something unexpected turned up. It gets frustrating when you spend more time maintaining plans than executing them. What a waste of time, right?

What matters

Ideally, you want a resource plan that isn't just a snapshot of what everyone's working on right now; you need a plan that includes all future work in the pipeline. This way you have a clear and realistic picture of what's achievable with the resources you have. Plus, when you have concurrent projects with overlapping start and end dates, how else can you create a reliable schedule for future projects?

What works

You need a plan that helps you manage your resources over an entire portfolio of projects. You can also plug in future project work to see what's doable over time, and as priorities shift.

FUTURE
FORECASTING



You need a view of your project world that shows you all of your commitments. This way, you can plug in future project work to show you what's doable as life moves on and priorities shift. And you need to be able to do that as quickly and as painlessly as possible.

Managing your future with LiquidPlanner

Even with a wide range of resources spread over many projects, LiquidPlanner will automatically schedule out any number of projects and tasks based on all the resources you have available. There's no danger of double-booking, and no need to manually set up or maintain a complex set of dependencies. When you build out a project you'll see estimated start and end dates for the work that's assigned based on the availability of team members and their priorities. And, LiquidPlanner's analytics features provide reports of work remaining, like this remaining trend report.



Imagine being able to look into the future to know when a team member is available to take on more work, as well as being able to more easily plan for those times when that team member isn't available. You can envision projects, build them out, and execute them almost flawlessly.

**FUTURE
FORECASTING**



WRAP UP

Effective resource management in a multi-project environment doesn't have to be an ongoing challenge! If you have the right processes set up and a resource-driven project management system like LiquidPlanner, you can optimize your resources while accommodating shifting requirements and priorities.

When you can manage your resources in a responsive manner instead of a reactive one, it can feel like practical magic.



 **LiquidPlanner**[®]

To see how LiquidPlanner helps you manage resources like never before, contact us!

1-888-881-2561

sales@liquidplanner.com