



## Resource Management Tool in Action

### Table Discussion Led by Stuart Dixon

Stuart has been a PMO practitioner for nearly 20 years and been involved with the APM PMO SIG for the past 2 years as Volunteer Co-ordinator. He works for AXA PPP Healthcare as a Resourcing and Programme Office Manager looking after resource management for over 250 resources, and PMO team of 7 individuals.

The session will showcase the MS Excel tool based tool used within AXA to control and predict IT resources across projects and BAU. It will cover what the tool does, who uses it, why they use it for, and an open discussion of the issues that have been have faced along the way, and the solutions for overcoming them.



Stuart was tasked with the job of sorting out the resource management of the organisation; in this session he also shared a set of accompanying slides which are also available on the website.

For their resourcing pool they wanted a long term view and created a tool which is used by senior managers, resource managers, project managers and of course the PMO Manager. The tool allows them to see who – within the IT department – is working on what. They also use Clarity, which feeds the tool, however the tool existed before such project management tools were available. The tool is also supplemented with data not available from Clarity for e.g., vacancies (because those tend to be confidential) and also pipelines.



View Slide 6 – one tool is used for everyone in the department – which is huge. The front page of the tool gives a high level – and uses colour coding to help the reader read the tool better.

Stuart shared the actual live tool – which for confidential reasons we cannot share on the website. Here's a brief overview of what he was sharing. The high level part of the tool shows three things – what is the current demand (what people are needed); what is the capacity; and what are the in-flight projects (projects that are currently running and have resources). The tool allows the PMO Manager to see exactly where they are in relation to resource demand and where there are resources currently being under utilised.

The tool has allowed the PMO to assist the Project Managers in planning better, because resource management becomes much more visible the PMs can see the result of ineffective forecasting. % of over allocation for example becomes much more visible – the Project Manager can see which one of their team members may be over allocated to projects or would be at some point during the project. The tool also allows them to see the split between contract and permanent staff which has been important during the downturn when it comes to reducing contractor numbers.

View Slide 10 – the ability to look at individual programmes (and projects) and show the demand for particular resource types. The tool goes into details where needed (especially where a discrepancy looks obvious). The tool will also show the number of hours someone has been working on a particular programme or project (this is through an extraction from the Clarity tool). Delegates should explore what tool or data might already be available and how this can be incorporated into a tool like this one. The key in PMO is "**single source of data**", and ensuring this is consistent - if you don't have this you need to look at this first.

The Resource Managers perspective, the team utilisation view (again with colour coding) makes utilisation of the resource pool very clear. Red/amber is over utilised, blue and green under utilised. Throughout the tool there are checks and balances which allow the PMO Manager to ensure that the data is right.

The tool will give a list of all the projects (approx 60 projects at any one time) and allow a drill down. It will also give a list of the people on each project – which in turn allows the project manager to see the whole team utilisation – which people are under or over utilised. The same source data is cut depending on who wants to see what – so the Resource Manager sees what they need and the PM what they need to see.

The thing with resource management is that you need to see about 6 different types of data all at the same time which of course a spreadsheet can't do.

Questions around the table gave some additional insights;

- The tool also allows the PMO Manager to do "what if" scenario planning.
- If your organisation does not have tools like Clarity, start in earnest with a simple Excel tool - updating on a monthly basis. Do this before exploring tools like Clarity.



- Ultimately the information that the tool is presenting back to the various audiences is actually coming from the data that they are inputting (the Project Managers use Clarity)
- The tool is managed by one of the members of the PMO team
- The value and benefit comes from being able to see the resource requirements out in the future
- Updating the tool takes about ½ day a week – the data manipulation side. Then there is the time required to make sure the information is right. This will include walking around and seeing the various project managers where the data might not appear right.
- The PMO does have a separate best practice part which looks at estimating techniques for the project managers, this goes hand in hand with ensuring a tool like this gives accurate information.