



ProSymmetry' S Resource Management Maturity Model: A Change Oriented “Purposeful” Approach

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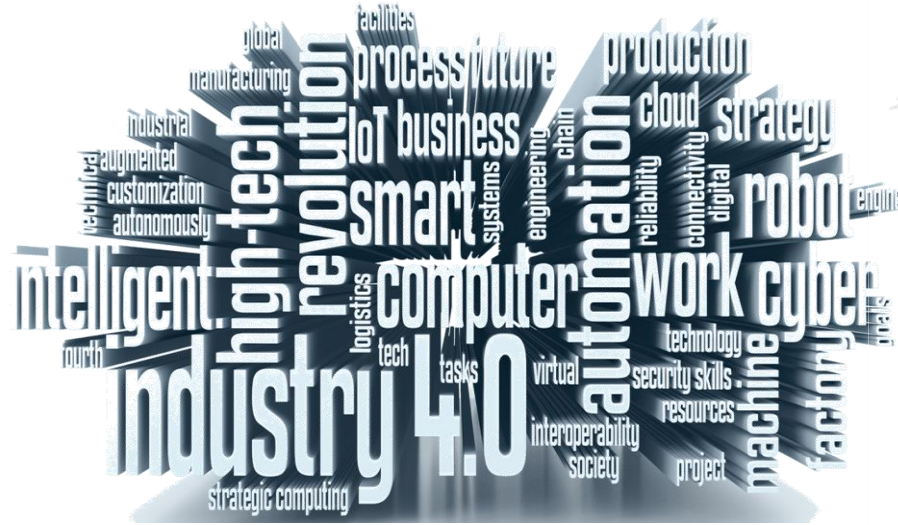
Vice President Resource Planning

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The Future Has Arrived Sooner Than We Expected...

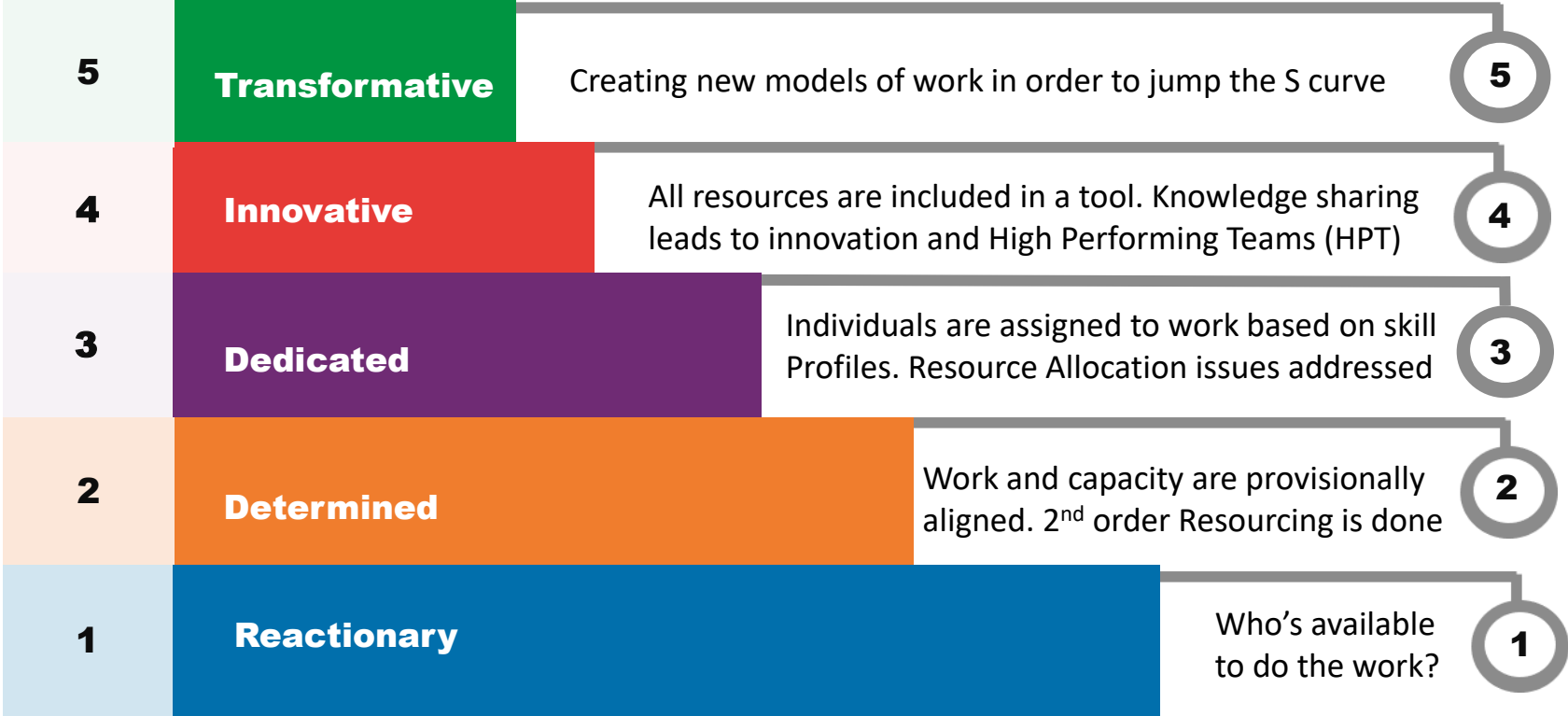


Agenda

1. Introduction to the three components of the resource management maturity model
2. Overview of the five levels of resource management maturity
3. Overview of the five resource management maturity capabilities



Resource Management Maturity Model



The Resource Capability Model

Core Dimensions

Strategy Execution	Start with an executable strategy, Involve SBU staff in designing tactics. Use Program Management teams. Develop specialist staff. Plan for change and innovation
Operational Excellence	Obtain demand forecasts, obtain supply information, match resource requirements with planned work, manage resource allocation, manage in-process conflicts to ensure timely delivery
People	Assign people to right work, optimize career goals, create opportunities, foster personal mastery, encourage agility, independent thinking and action
Technology	Get the right resource management tool for your culture. Use technology as a point of integration across the organization. Use the right tools to share information (not status) across the enterprise
Enterprise Agility	Trust, Resilience, Culture, Sustainability, Principles, Team/we focuses

Corporate Cultures Determines When And How Things Get Done

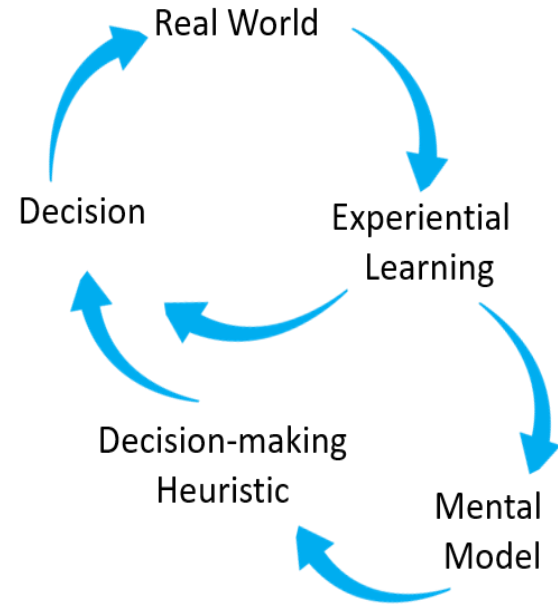


Overview Of The Five Steps

Of The Resource Management
Maturity Model

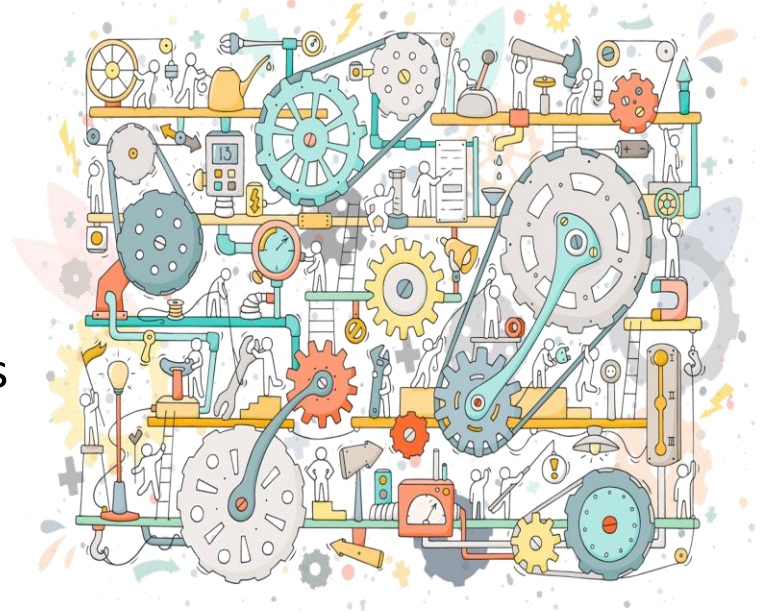
What To Focus On At Level One: Changing The Mental Model

- The human brain isn't good at multi-tasking. Limit simultaneous assignments
- Never confuse the urgent with the important – stop letting production steal project resources
- Stop worry about “estimates of work” and ask when work will be done if there are no interruptions
- Utilization is only appropriate for robots and consultants



What To Focus On At Level Two: Building The Operational System

- Segment demand (how much effort should go to operations vs strategic.)
- Assign resources in priority order, then stop no matter what the list says
- Start a community of practice with the PMs around delivering projects quickly.
- Get resource management software

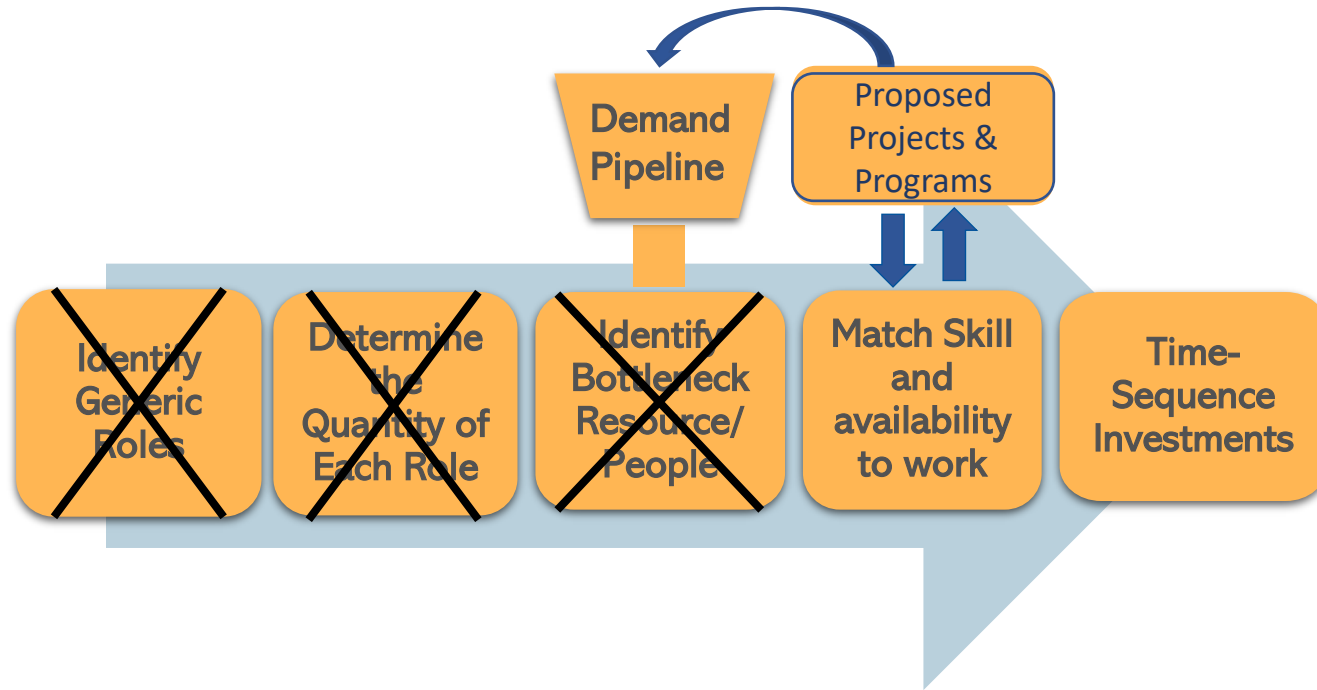


What To Focus On At Level 3: Making The Organizational Gears Mesh

- Capacity is planned based on the availability of the *right* named resource
- The portfolio is evaluated at least quarterly and adjusted as needed based on value
- Skill development planning is recorded in the resource system
- Problems are solved by the people involved
- Individuals interact with the resource management software

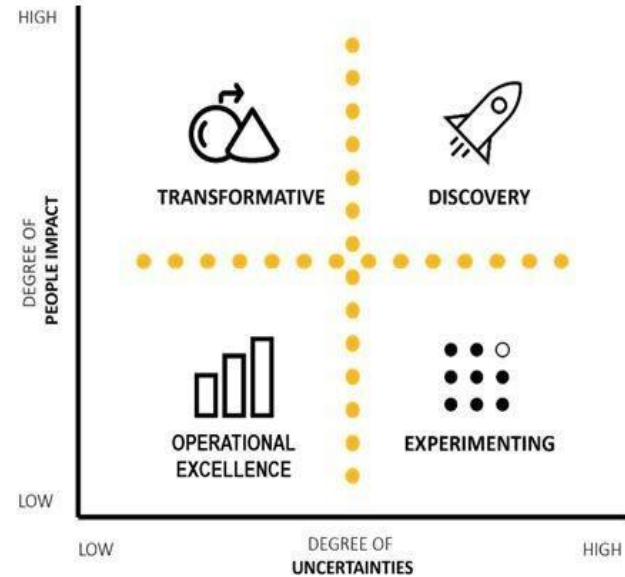


At Level 3 The Portfolio Should Be A Well-oiled Machine

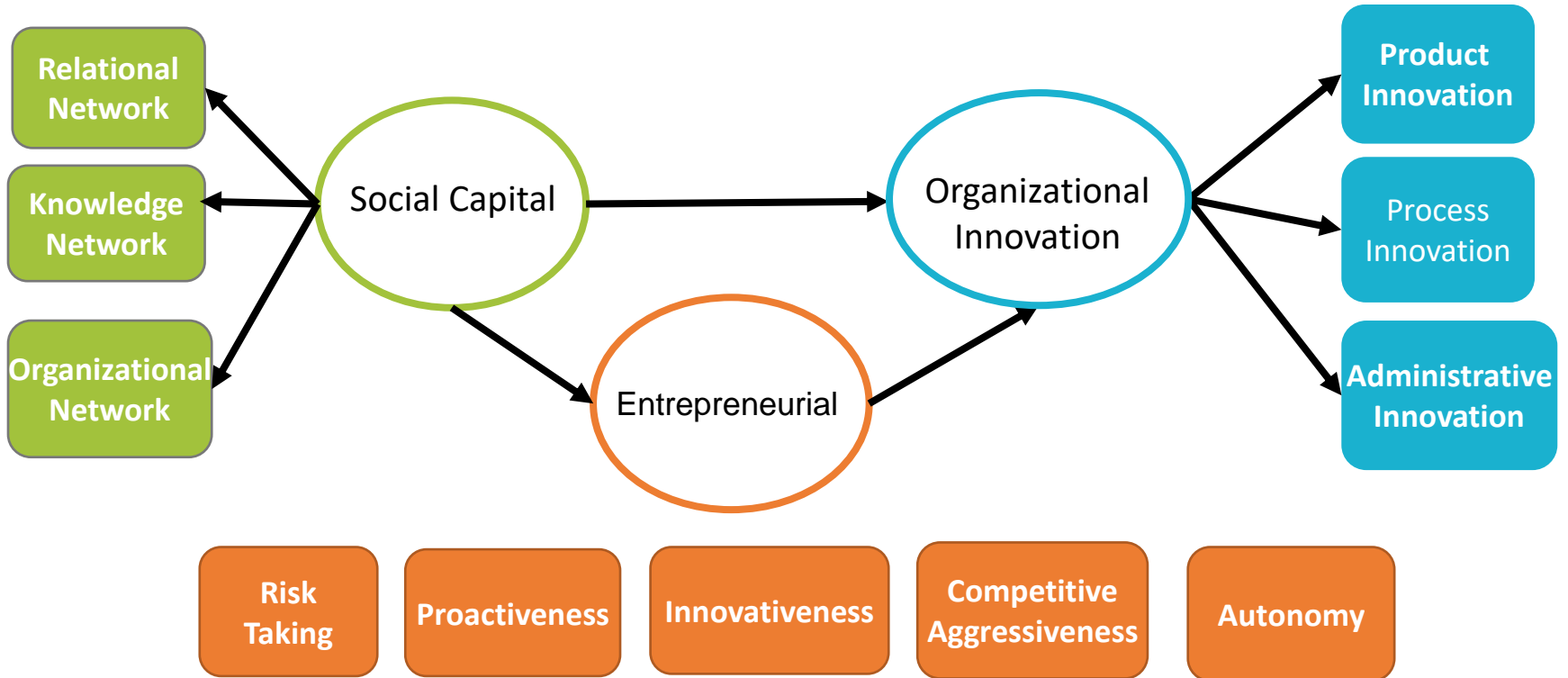


What To Focus On At Level 4 – Crossing The Yellow Lines And Preparing To Jump The S Curve

- All four of the boxes require different skills and personalities
 1. Operational excellence requires people who understand repeatable process.
 2. Experimentation requires engineers: “We know this should work and we’ll keep trying till it does”
 3. Transformation requires project people. “We see the destination and we are smarter enough to get there”
 4. Discover requires observation and out of the box thinkers (plus luck)



At Level 5 Focus On Jumping the S Curve By Making Sure Everyone is Working Just Right

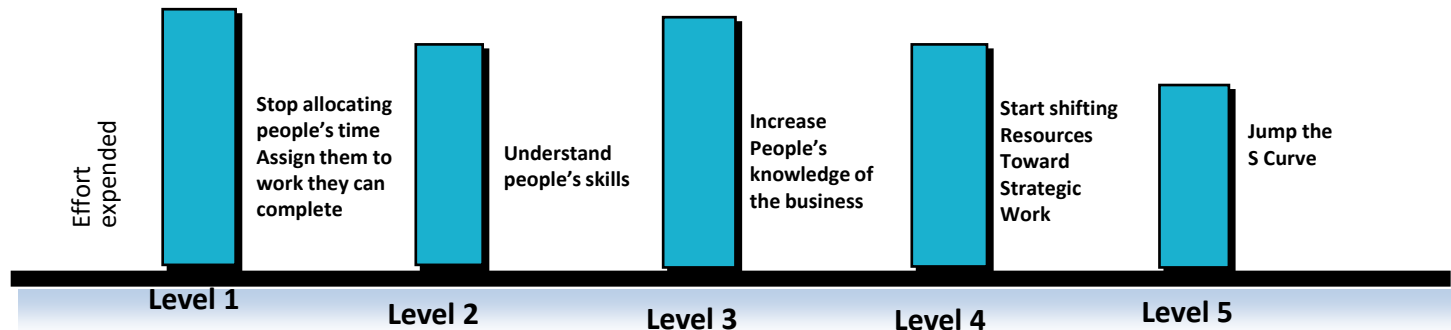


Overview of the Five Capabilities

Of The Resource Management
Maturity Model

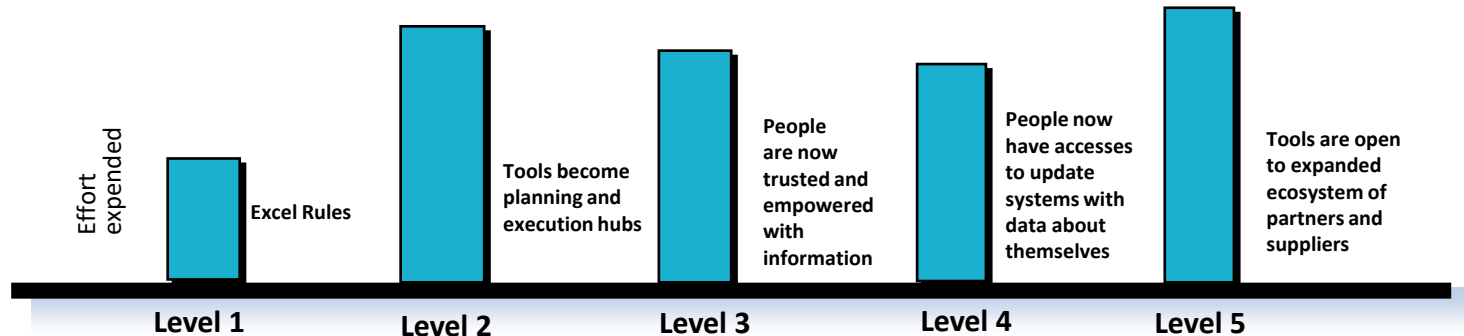
Operational Capability

- **Mental Model** – batching work is faster and yields a higher quality than starting everything at once.
 - All work is not the same. The solution might be a “factory”, a team, or people working together
 - Slack and over capacity are NOT the same things. Slack is risk reduction
 - People are not Robots
- **Resource Management Practices**
 - Identify bottleneck resources- immediately build a team around them
 - Develop role based competency standards
 - Support Career Rotation through business and technical positions



Technology Capability

- **Mental Model – Technology is now a key player in getting work done**
 - Use your resource management tool as a share hub for information
 - Give people a platform for showcasing their knowledge and abilities
 - Find technology that crosses organizational boundaries
- **Resource Management Practices**
 - Make sure your people have the right thinking tools (even if they aren't corporate standard)
 - Never use technology to supervise people
 - Some technology use might be thinking time



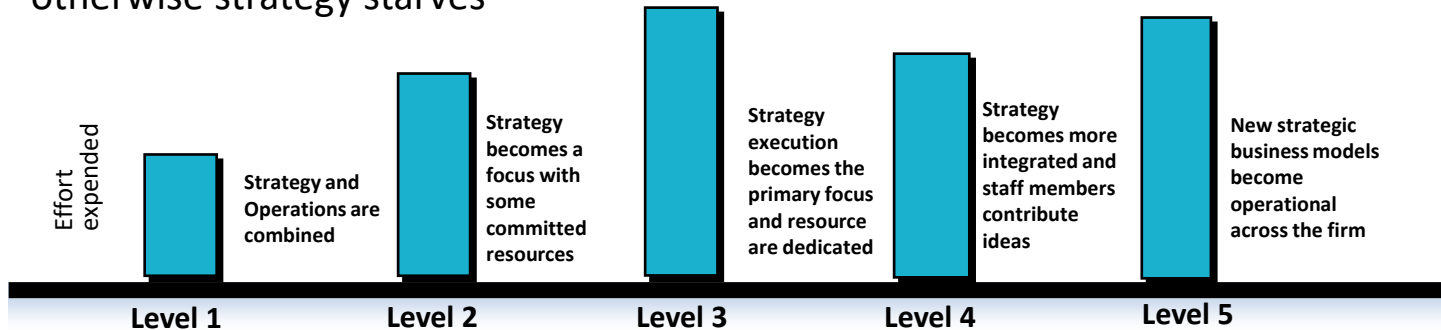
Strategic Capability

- **Mental Model - If you can't execute your strategy – then you don't have a strategy**

- Always set up a program for your strategy objectives
- Strategic projects are designed to achieve a strategic objective – other benefits are nice but secondary
- Define what percentage of funds/people should go to strategy otherwise strategy starves

- **Resource Management Practices**

- Assign your most innovative and creative people to strategic work
- Rotate staff so that operational people understand strategy and vice versa.
- Focus on the individual's ability to be a team member as the transferable skill



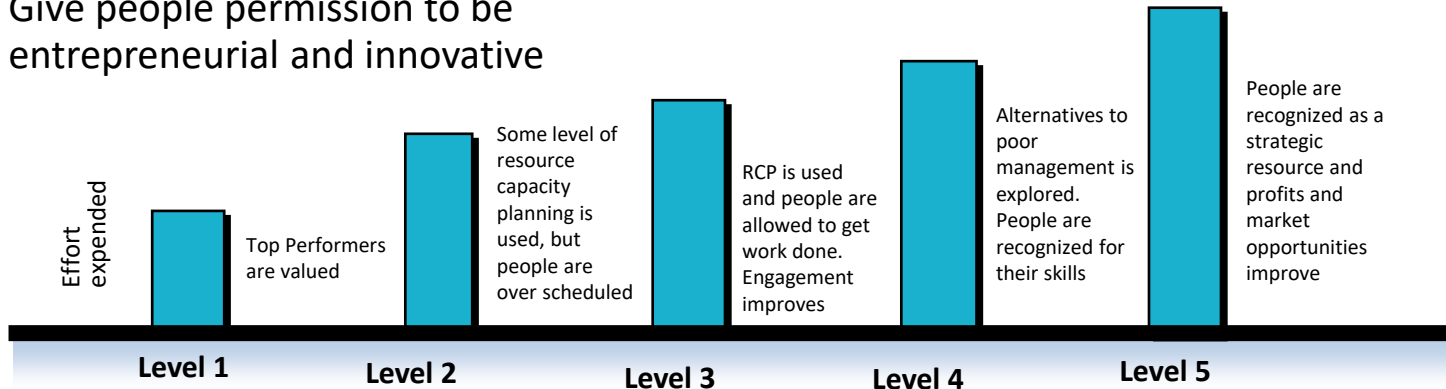
People Capability

- **Mental Model – Trust and respect your people**

- Poor management is EXPENSIVE – working well with people is a skill and attitude
- The day of the hierarchy is done. People managers (RM) and SME Leads makes more sense
- Give people permission to be entrepreneurial and innovative

- **Resource Management Practices**

- Understand how **People** work
 - Neurocognitively
 - emotionally
- Give people opportunities for personal mastery
- Create growth opportunities



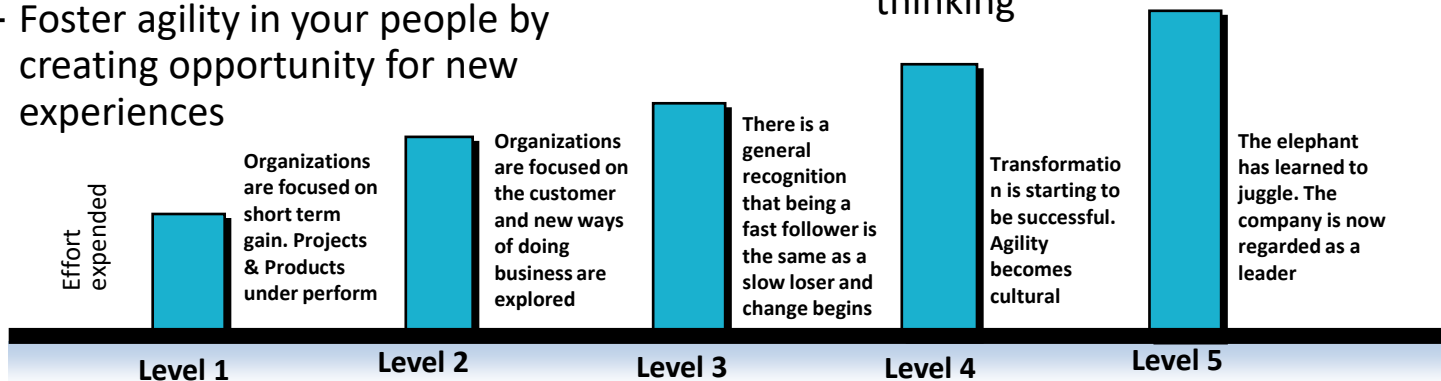
Enterprise Agility Capability

- **Mental Model – understand how the world really works**

- All systems have boundaries
- All systems have emergent properties
- Planning is good, believing a plan represents tomorrow's reality is foolish
 - Embrace scenario planning
- Foster agility in your people by creating opportunity for new experiences

- **Resource Management Practices**

- Listen to people
 - Invest in communication specialists
- Train everyone to think about what can go wrong
- Encourage entrepreneurial thinking





Self-appointed

The role of the resource manager

THANK YOU

Q&A

For more information, **demos, trials**
gbailey@prosymmetry.com

Visit us at <http://prosymmetry.com>

Will send information on the upcoming
**Resource Management Global
Virtual Conference**
7 speakers



Tempus Resource is a next generation Resource Portfolio Management solution available in the cloud or on premise. Uniquely, it provides actionable intelligence to Executives, PMO's and resource managers through an array of real time modeling and what if simulation capabilities.

Tempus Resource is available as a stand alone resource planning tool replacing spreadsheets or integrated with other systems. Clients have from 50 to 50,000 resources.

- Tempus Resource by ProSymmetry named Cool Vendor 2016 for PPM Resource Management
- Tempus Resource in Gartner 2019,2018, 2017 and 2016 Hype Cycle-Resource Planning
- Tempus Resource named in 2016, 2015 PPM Market Guide (strategic decision making).



Regulating doctors
Ensuring good medical practice



SAATCHI & SAATCHI





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TEMPUS RESOURCE

NEXT GENERATION RESOURCE MANAGEMENT



**USE STAND ALONE:
ENTER DATA DIRECTLY**

OUR POWERFUL PROPRIETARY TECHNOLOGY PERFORMS INSTANT "WHAT-IF" SIMULATIONS AT THE TOUCH OF A BUTTON.

MANIPULATE, EXPERIMENT, JUGGLE AND REPORT WITHOUT IMPACTING LIVE DATA.



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Activity	Start	End	Start	End	Start	End
Activity 1	0	10	0	10	0	10
Activity 2	0	10	0	10	0	10
Activity 3	0	10	0	10	0	10
Activity 4	0	10	0	10	0	10
Activity 5	0	10	0	10	0	10
Activity 6	0	10	0	10	0	10
Activity 7	0	10	0	10	0	10
Activity 8	0	10	0	10	0	10
Activity 9	0	10	0	10	0	10
Activity 10	0	10	0	10	0	10

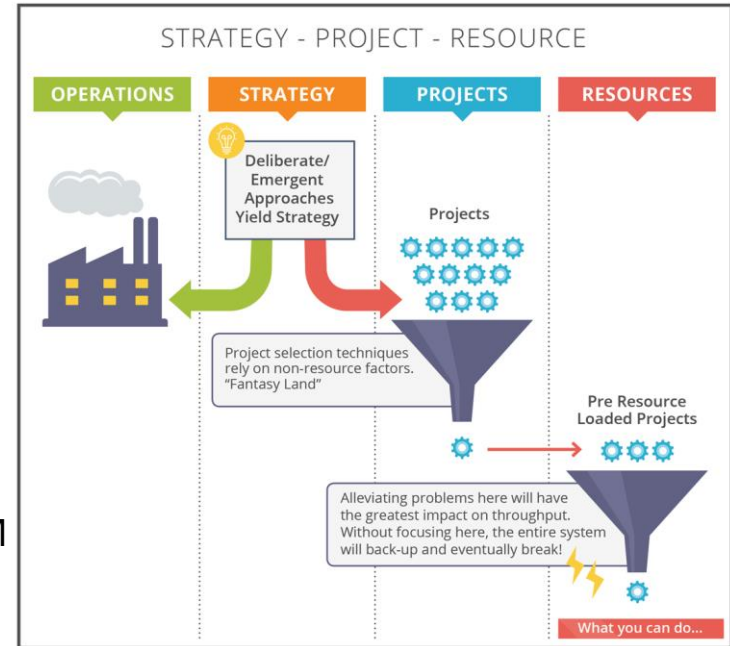
PORTFOLIO RESOURCE PLANNING SOLVES A UNIVERSAL PROBLEM FOR COMPANIES

How often are you asked?

1. Where are our resource constraints?
2. How many new projects can we start?
3. What if we start new or delay existing work?
4. What happens if we cut headcount?
5. When can I start this new project?
6. What if we delay program X?
7. How can we fit in more work?
8. What skills/roles are most impacting delivery?
9. Is there an easy way to get off excel ?
10. Can I do What If Scenarios with my existing PPM tool ?

FIGURE 1

Resources define project delivery capabilities

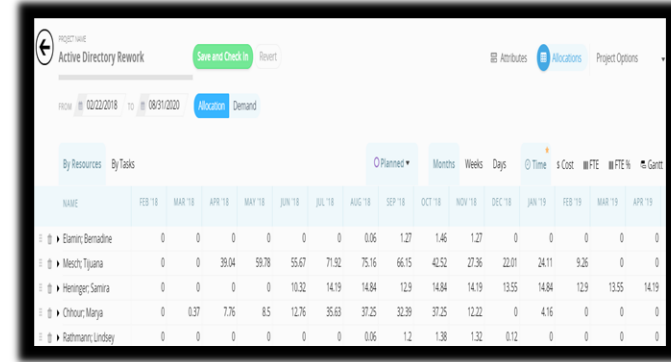


Resource Product and Project Portfolio Management



Resource Portfolio Scenario Planning

- Real time What-If Analysis.
- Adding and reducing headcount scenarios
- What happens if we delay a project or shift a project?
- What about expanding/collapsing a project timeline?
- Urgent new project comes in. What do we do ?
- When can we start a project ?
- Where are resources available?



Data Entry Easy like a spreadsheet

- Enter at project level- no detailed tasks needed
- Enter in manhours, FTE's or % of time
- Realistic supply and demand view including maintenance and support work
- Integrate with PPM and other tools

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Overall Peer Rating

4.7 ★★★★★ (32 reviews)

Willingness to recommend

91% Yes 👍 33 Reviewer(s)

Great, easy and smooth implementation with a fantastic customer centric vendor to support

— Sr. Multi Project Manager in the Healthcare Industry

Fast, Intuitive, Resource Analysis Solution

— Associate Director Global IT PMO in the Manufacturing Industry

Implementation was a breeze and I had Sr. Leadership ready data and summaries immediately

— Director PMO in the Manufacturing Industry

Affordable Resource Mgmt PPM solution. This product more than meets our needs.

— VP Enterprise Program Mgmt Office in the Finance Industry

Exceptional solution provider for enterprise portfolio resource management

— Portfolio Manager in the Manufacturing Industry

Intuitive and easy to use for complicated resource planning scenarios

— Director in the Services Industry



Program/project Management Create Program/project

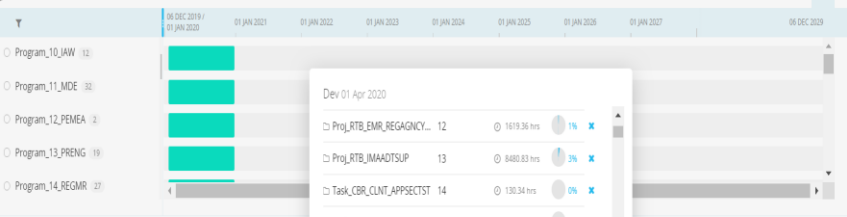
NAME	PROGRAM/PROJECT OWNER	PRIORITY	NEW PROGRAM NAME	NEW PROJECT NAME
New Program Name	Program_10_IAW	COUNT: 12		
New Project Name	Proj_IAW_IS	COUNT: 5		
Task_IAW_IS_ENHTSTSPRT	Program_10_IAW		Program_10_IAW	Proj_IAW_IS
Task_IAW_IS_INTGMPNTS	Program_10_IAW		Program_10_IAW	Proj_IAW_IS
Task_IAW_IS_INTGINTPRTL	Program_10_IAW	41	Program_10_IAW	Proj_IAW_IS
Task_IAW_IS_NTGDVCLNTSPRT	Program_10_IAW	41	Program_10_IAW	Proj_IAW_IS
Task_IAW_IS_NWENHSAPI	Program_10_IAW	41	Program_10_IAW	Proj_IAW_IS
New Project Name	Proj_IAW_N360WF	COUNT: 7		
Task_IAW_N360WF_INEXTLSINTG	Program_10_IAW	40	Program_10_IAW	Proj_IAW_N360WF
Task_IAW_N360WF_ERLYACSSNSET	Program_10_IAW	40	Program_10_IAW	Proj_IAW_N360WF
Task_IAW_N360WF_FLXHRCPRTFW	Program_10_IAW	40	Program_10_IAW	Proj_IAW_N360WF



Tempus Resource by ProSymmetry

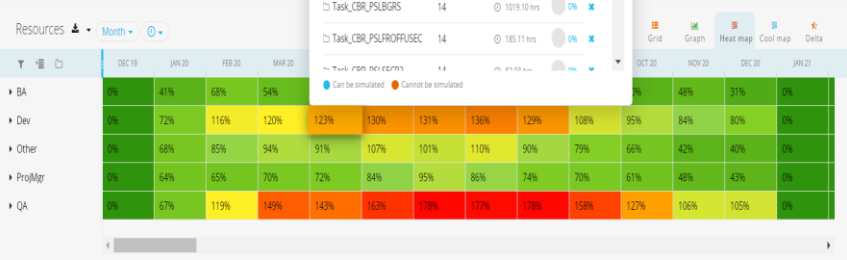


Pershing by Role 06 Dec 2019 to 06 Dec 2020



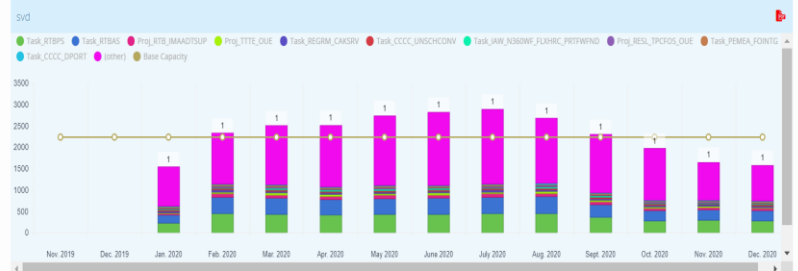
Dev 01 Apr 2020

- Proj_RTB_EMR_REGAGNY... 12 @ 1619.36 hrs 1%
- Proj_RTB_IMAADTSUP 13 @ 8480.83 hrs 3%
- Task_CBR_CLNT_APPSECTST 14 @ 130.34 hrs 0%
- Task_CBR_PSLBGRS 14 @ 1019.10 hrs 0%
- Task_CBR_PSLPROFFUSEC 14 @ 185.11 hrs 0%



Pershing Dashboard by Administrator

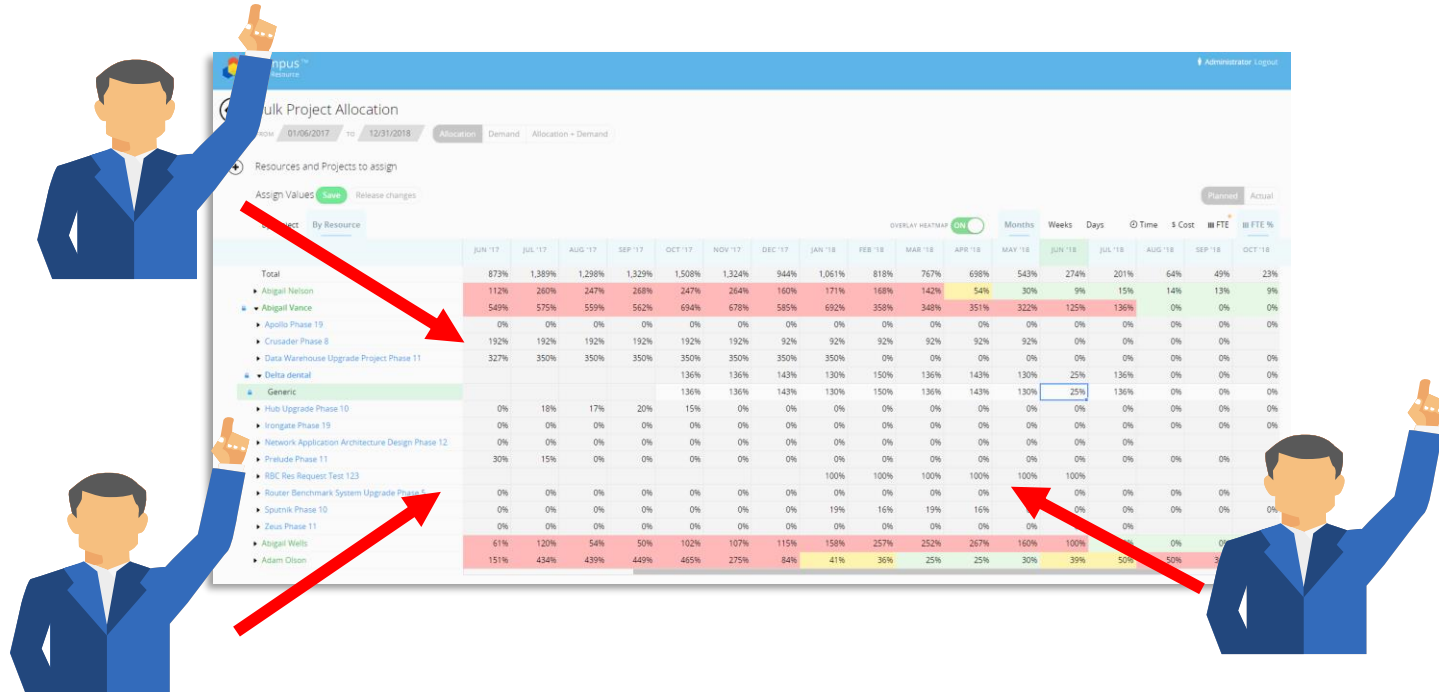
Year	Quarter	Month	Week	Day	FTE Gap	Resource	Service
2019	Q4						
2020	Q1						
2021	Q2						
2022	Q3						
Grand Total							
							FTE gap
							Jm Chin
							Service_1_ALB_BA
							Service_1_ALB_Dev
							Service_1_ALB_Dev_1
							Service_1_ALB_Dev_10
							Service_1_ALB_Dev_11
Rep. v	Total Allocation	0	74.56	93.11	89.71	5	
	Net Capacity	74	74	74	74		
	Remaining Capacity	74	-0.56	-19.11	-15.71	2	



Resources	NOV 19	DEC 19	JAN 20	FEB 20	MAR 20	APR 20	MAY 20	JUN 20	JUL 20	AUG 20	SEP 20	OCT 20	NOV 20	DEC 20
10_CUSTSRV	2227	2227	734.73	(24.51)	(199.17)	(212.27)	(430.17)	(511.93)	(585.43)	(370.53)	(4.37)	311.99	630.64	705.61
11_DS	42	42	0.10	(13.51)	(17.36)	(19.8)	(24.92)	(26.75)	(29.71)	(26.91)	(22.11)	(21.55)	(14.6)	(13.83)
12_DM	43	43	14.77	(3.73)	(5.38)	(5.25)	(9.63)	(11.32)	(13.19)	(12.87)	(4.79)	2.31	7.30	9.02
13_FA	61	61	37.73	22.57	18.09	15.77	8.98	7.92	5.04	10.66	18.47	26.62	33.70	35.87
14_FRC	68	68	20.09	(10)	(13.52)	(13.69)	(21.43)	(25.89)	(28.92)	(27.13)	(14.47)	(3.82)	4.68	7.85
16_INFDEL	12	12	(0.34)	(8.25)	(9.07)	(9.55)	(8.91)	(8.89)	(9.66)	(8.71)	(5.59)	(3.85)	(3.21)	(2.63)
17_INFSEC	90	90	26.32	(15.18)	(20.51)	(18.72)	(25.93)	(29.12)	(34.35)	(18.81)	0.25	17.75	25.19	27.39
	68	68	17.91	0.54	(9.4)	(10.69)	(23.21)	(29.97)	(31.86)	(18.04)	(9.39)	(17.29)	13.21	15.81

CONCURRENT MANIPULATION OF DATA

- Allow Resource Managers to concurrently edit resources across shared projects.





PROJECT NAME
Fireball Phase 30

Check out

Attributes Allocations

04/02/2018 11/10/2019 Allocation Demand

Resource Task Options

Quarter Month Week Day

- Audit Log
- Build Team
- Financials
- Milestones
- Snapshots
- Schedule**
- Sheets

	Q2 18	Q3 18	Q4 18	Q1 19	Q2 19	Q3 19	Q4 19	
Samuel Rivera	0	68	0	0	0	0	0	
Lawrence Williamson	0	33	0	0	0	0	0	
Keith Gibson	0	0	0	0	38	0	0	
Deborah Blake	0	0	0	0	0	0	23.6	144

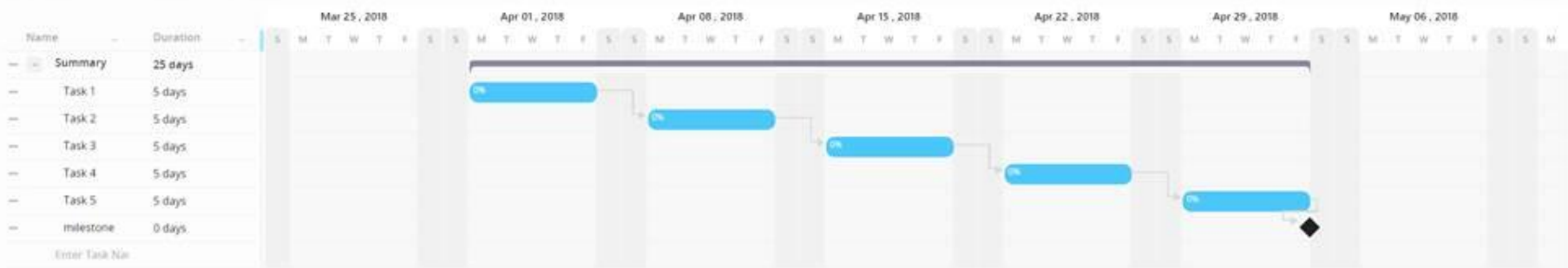


PROJECT NAME
Fireball Phase 30

Save

Attributes Allocations Schedule

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THANK YOU

Q&A

For more information, **demos, trials**
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Visit us at <http://prosymmetry.com>

Will send information on the upcoming
**Resource Management Global
Virtual Conference**
7 speakers
June 24th

