



EBOOK

A Better Approach to Resource Scheduling

Optimize How You Manage Your Most Valuable Resources



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Introduction

Your team is consumed with work. Your projects take on a horrific cycle of panic and chaos. What should be well-outlined tasks and assignments are actually an avalanche of ad hoc requests, numerous emails, endless meetings, and compounded stress. All of it combines into the perfect storm—one that negatively affects your team.

Did you know that:

- **94% of workers feel overwhelmed to the point of incapacitation¹**
- **9 out of 10 companies fail to execute their strategic vision²**
- **66% of workers don't have time to finish work³**
- **2 out of 3 projects ultimately fail⁴**

It's no wonder that mayhem, stress, and burnout have become a daily occurrence for many teams, including yours. It's almost impossible to find a solution to your problem if you don't know what's causing it. So, isn't it time to get a handle on how you can better plan your work and optimize how you manage your resources? But where do you start?

To get your head around improving your resource scheduling, consider a few questions:

- 1. Does your team have a centralized view of all your work?**
- 2. Do you have the ability to effectively determine the capacity of your resources?**
- 3. Does your team know what work is the most important and how much time they should spend on project-related tasks?**

This eBook will discuss common problems associated with planning work, provide tips on overcoming challenges associated with allocating resources, and define how better resource scheduling helps connect the right work to the right people, every time, in an effective, efficient, and simple way.

1 Problem

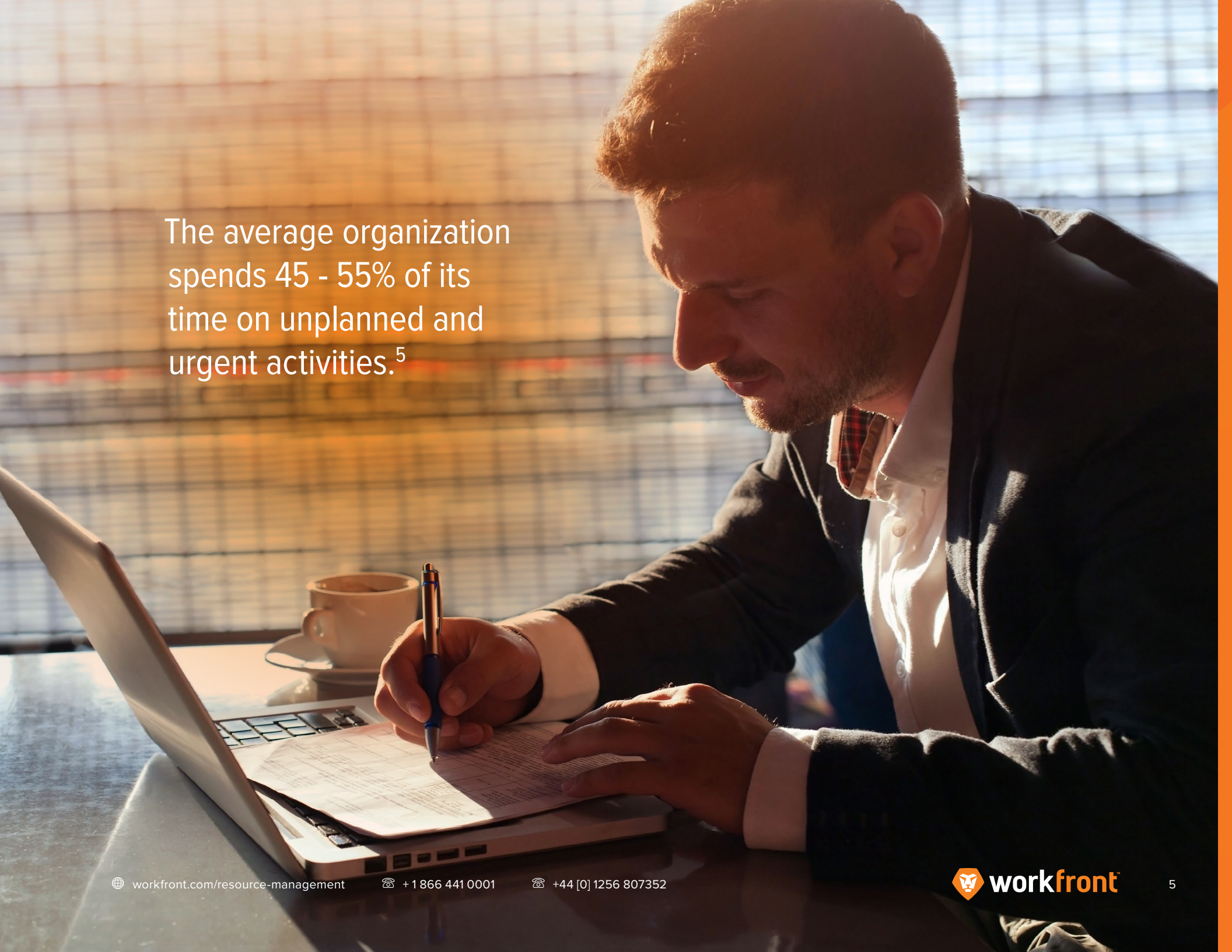
There's no easy way to visualize the total scope of your workload

You already have a full day planned and assignments made—then you get three emails and a sticky note in a meeting. Of course, during the lunch hour, you're stopped in the hallway to discuss another project idea, and back at your desk you're interrupted by a phone call from someone needing to change requirements on an existing project. Work continues to pile up quickly as you try to stay afloat—honestly, it's like playing a game of tackle-and-block.

As if planning projects and assigning tasks isn't difficult enough, you and your team also have to make sure the right people are working on the right projects. In fact, the average organization spends 45 - 55 percent of its time on unplanned and urgent activities.⁵ With requests coming in from all over, it's hard to easily prioritize the heavy load of tasks, let alone strategically assign tasks.

What's worse is that with low visibility into the entire scope of tasks allocated to your team, and work assignments scattered among team members—typically within multiple spreadsheets—often the most valuable projects take a backseat to emergency fire drill requests and “squeaky wheel” stakeholders who want their request to be at the top of the list. The inability to have a clear view of all work, on both assigned and unassigned tasks, means it's hard to manage the priority of the projects on your team's list. No wonder you're faced with extended hours, frustration, burnout, and deadlines that feel impossible to meet.

Since teams can work on thousands of projects during the year, the stress and issues that come with a lack of visibility can add up to a lot of missed deadlines, inefficient use of time and resources, and wasted money. Attempts to plan and prioritize work without a central view can leave your resources without a life vest to hold to, and managers frantically attempting to stay afloat.

A man in a dark suit and white shirt is sitting at a desk, leaning over a laptop. He is holding a blue pen and writing on a document that is resting on the laptop. A white coffee cup is on the desk next to the laptop. The background is a window with a grid pattern, and the scene is lit with warm, golden light, suggesting late afternoon or early morning.

The average organization spends 45 - 55% of its time on unplanned and urgent activities.⁵

1 Solution

Improve visibility and access to work

You already know how well a system of juggling multiple spreadsheets, emails, and documents works for your team. In fact, one in three enterprise workers attribute their work failures to a lack of clear processes and priorities.⁶ What you need is the ability to see, manage, and allocate projects in one place. To stop the chaos that surrounds the planning of work, try implementing some standard processes designed to centralize the work.

Before you start to plan (and in order to better understand the scope of all your work) require that all requests are submitted to a central location. No more hallway drive-bys, random emails, or notes left on desks. You can choose whether they are submitted through a work management tool, a shared spreadsheet, or some other system, but there must be no exceptions. Consider enforcing a rule where if a request isn't submitted through the designated channel, then the request isn't considered valid. When requests come through one channel, it becomes easier to track and distribute work to your team.

BENEFIT

With everyone on the same page and all your information in a single location, it becomes much easier to see exactly what's happening within your team in real time. After all, it does no good to do an amazing job of

resource scheduling only to realize there's another request to throw in the mix that's been waiting on your voicemail for the past two days.

Consider finding a single tool that allows you to create a centralized capacity view and calendar of your team's workload and available hours. With a visual calendar-style representation of work, team members can see what tasks they're assigned, commit to timeframes, and see how many hours they should be allocating toward specific tasks and projects. How you approach creating your calendar is up to you, whether it's a physical, tangible calendar on the wall for everyone to see, a shared online calendar, or if it's a calendar built within a tool. Having a comprehensive view of assigned and unassigned work is key.

BENEFIT

Once all work is in the pipeline, and you and your entire IT team can see what's being asked of you, it's much easier to see what work is truly urgent, what can wait, and how to best delegate tasks based on who is working on what. Taking a visual approach to planning helps managers gain insight into the team's workload and bandwidth capacity. This will also help in delegating the appropriate amount of work to team members, while allotting time for meetings, managing email, and ad hoc requests that can catch everyone off guard.

Problem 2

You have no insight into the capacity of your resources

As a manager, do you know exactly what your team is working on? Can you tell if your resources have the capacity to take on new tasks?

Managing and planning work effectively requires full visibility of your team's workloads and capacity so your traffic and project managers can efficiently plan for the distribution of that work.

Complicating the problem of not knowing who is doing what, is the lack of insight that leads to the inability to easily pivot and adjust to changing requirements midstream.

Currently, most teams lack the ability to easily and quickly check team members' capacity and assign or reallocate work without going through an extremely tedious, manual process—which can lead to randomly assigned work, overloaded team members, and missed deadlines.

In fact, in an attempt to get a clear vision of projects' status, productivity takes a serious hit. The 2016 State of Enterprise Work report reveals that the top three things that get in the way of work includes excessive oversight (42%), excessive emails (43%), and wasteful meetings (59%).⁷ With these numbers, it's not surprising that 23 percent of workers say that a more efficient work process would improve productivity.⁸ Too much time is spent searching for the right information leading to a loss in focus. Not to mention the additional chaos that comes with unforeseen problems and emergency, ad hoc requests.

As organizations struggle to understand the capacity of the team, prioritization may suffer too. A limited view of capacity and understanding of priorities could lead to working on one project only to find that the solid deadline for another is tomorrow.



23%

23% of workers say that a more efficient work process would improve productivity.⁸

Solution 2

Create a visual representation of work

Project managers need to be able to plan effectively and adapt to changes in order to remain relevant and truly utilize their resources effectively.

Before assigning projects and tasks, understand the bandwidth of each member of your team and consider the required time frames for each task. Consider implementing a tool that helps with easily assigning work as well as accommodates for mid-stream changes.

Ensure that as you delegate project-related tasks, you are also able to align the scope of capacity with what your team members are able to feasibly sustain—including accounting for time to address ad hoc requests (you know, the ones that seem to catch everyone off guard).

This can be done by:

Contouring

Contouring techniques or features within a tool allow resource managers the ability to easily see and allocate how many hours your team members should be dedicating to specific tasks. By breaking out the hours based on availability, value, or urgency of the project, your team can become more productive knowing exactly what they need to work on and when. Contouring hours for your resources can also help with

pivoting between projects and tasks. Another benefit is having the ability to split hours when two team members are assigned to the same task—resource and project managers can contour and personalize how many hours each role will dedicate to that project.

Swapping Assignments

The ability to easily and quickly swap resources between projects can add a tremendous amount of value to how your team addresses their workload. Swapping allows for a quick, efficient way for resource and project managers to assign work but also pivot resources based on changing task or project requirements. A resource manager no longer has to dig into each, single task to reassign them, instead they can mass reassign tasks saving them a significant amount of time and effort.

Drag-and-Drop

Efficiency is the name of the game for your project and resource managers so when a planning calendar or tool has a drag-and-drop feature available, it can save hours of time and effort. If a tool helps them sidestep the need to open up multiple windows to edit fields, or simply reduce the number of clicks needed to move tasks on the calendar, it's an effective tool that directly impacts their ability to be more efficient.

3 Problem

You struggle to connect the right people with the right work

With all of the available tools and technology today, many organizations still fail to collaborate and function optimally. Web conferences, social networking, instant messaging, emails, text messages, phone calls, meetings, and handwritten notes are all common forms of daily solutions for communication and planning work. However, the problem of not having a single tool that your team can rely on to help plan work and understand your resource capabilities still remains. And if you're using spreadsheets to manage both your work and resource assignments, then it should come as no surprise that 88 percent of spreadsheets have errors.⁹ Let's be honest, spreadsheets are outdated the moment they are updated.

And it doesn't help that meetings are thrown on your schedule to make up for the lack of centralized insight and disjointed communication. You might even find that it's more difficult to gather information on projects than it is to actually execute them.

And after all that effort, you still question if the right resources are working on the right projects. Are your high-value projects getting the appropriate amount of attention they deserve, from your most capable resources? Or are those resources spending more time on less valuable tasks?

	C	D	E	F	G	H	I	J	K	L
	Categories	Unit	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16
Personnel	1-Personnal	0	12,034	13,565	10,674	13,095	16,392	12,357	20,775	24,766
Personnel	1-Personnal	0	345	347	154	1,953	374	534	764	133
Personnel	1-Personnal	1	521	434	178	519	1,850	456	246	346
Personnel	1-Personnal	0	0	2,300	189	90	23	13,890	25,326	25,599
Personnel	1-Personnal	1	12,900	16,646	11,195	15,657	18,639	1,266	1,500	4,600
Personnel	1-Personnal	2	6,000	2,300	5,000	1,500	900	580	4,252	3,674
Marketing	2-Marketing	1	2,000	5,420	3,000	2,100	-	4,500	6,800	7,550
Marketing	2-Marketing	2	8,200	4,900	2,000	8,000	-	5,312	10,252	15,074
Marketing	2-Marketing	1	16,200	12,620	10,000	14,600	10,100	357	2,466	-
Marketing	2-Marketing	0	16,200	190	1,245	432	612	453	355	45,780
Marketing	2-Marketing	3	1,239	431	573	323	12,890	13,555	236	3,688
Marketing	2-Marketing	2	522	-	10,430	14,093	234	425	865	3,467
Marketing	3-Commu	1	10,432	532	156	567	34	346	28,812	56,965
Marketing	3-Commu	1	-	12	12	16,505	13,904	15,136	247	478
Marketing	3-Commu	0	-	1,243	12,416	15,890	12,009	145	207	109
Marketing	3-Commu	0	-	19,330	15,000	200	500	462	500	770
Marketing	3-Commu	4	12,662	15,333	155	200	746	2,074	1,632	1,703
Marketing	3-Commu	0	19,300	150	100	235	746	2,074	20,775	24,766
Marketing	3-Commu	0	200	500	356	16,525	13,375	12,357	-	-
Marketing	4-Other	0	400	153	15,611	16,525	16,392	534	764	133
Marketing	4-Other	2	683	16,136	10,674	13,095	374	543	246	346
Marketing	4-Other	0	20,583	13,565	154	1,953	1,850	456	25,326	25,599
Marketing	4-Other	2	12,034	347	178	519	23	13,890	1,500	4,600
Marketing	4-Other	0	345	434	189	90	18,639	1,266	1,500	3,674
Marketing	1-Personnal	0	521	2,300	11,195	15,657	1,200	580	4,252	-
Marketing	1-Personnal	1	0	16,646	5,000	2,100	900	-	-	-
Marketing	1-Personnal	0	12,900	2,300	3,000	-	-	-	-	-
Marketing	1-Personnal	1	6,000	5,420	-	-	-	-	-	-
Marketing	2-Marketing	2	2,000	-	-	-	-	-	-	-
Marketing	2-Marketing	1	-	-	-	-	-	-	-	-

88%

88% of spreadsheets have errors.⁹

Solution 3

Consider using a resource scheduling tool

Once you have the intention to access and view work in one place and better understand capacity, an effective resource scheduling tool can help:

- Visualize the entire scope of work requests in a single, central location
- Manage team resources efficiently
- Quickly check team members' capacity
- Gain visibility into unassigned and assigned tasks
- Easily pivot to address changing requirements
- Provide confidence that the right work is being assigned to the right resource

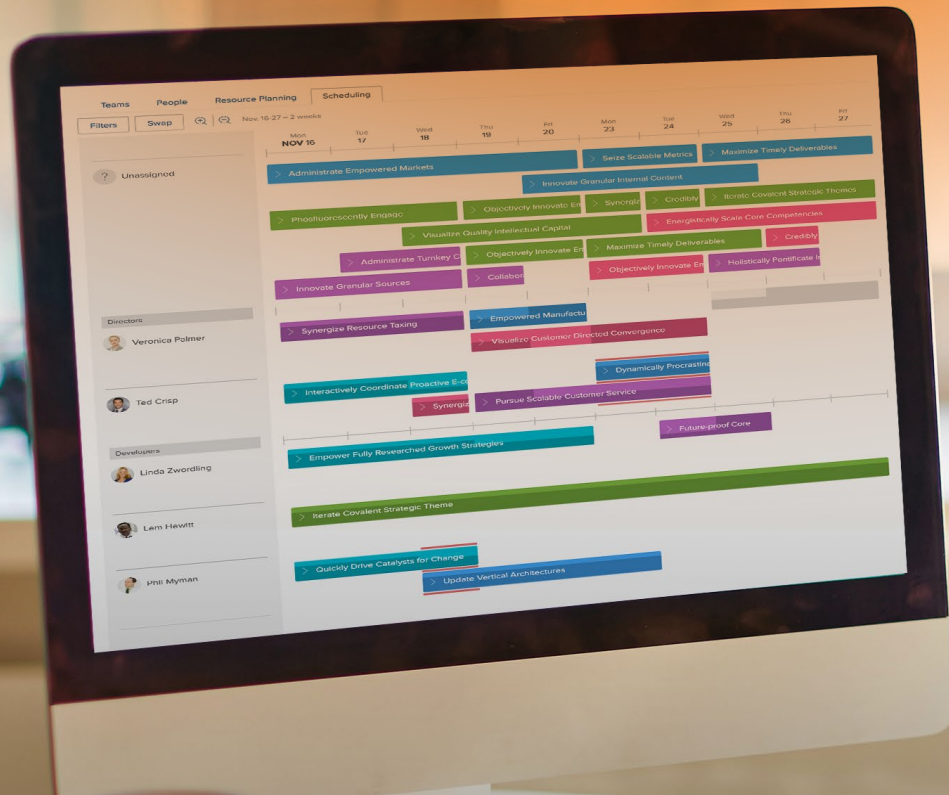
Look for features that help prioritize quickly and efficiently, like:

- A single calendar view that allows resources to not only manage tasks, but allows managers insight into each person's capacity
- Ability to contour hours on a per-task basis so your users know what to work on and how many hours should be utilized
- Drag-and-drop task assignment to save time switching between pages and tools
- Capabilities to easily swap users and roles assigned to tasks to help quickly address changes in requirements
- Filtered views for easier organization

When you allow full, real-time visibility and refined processes to help manage your organization, managers will be able to plan projects and use resources effectively and team members will have the reliable insight to efficiently use their time and skills.

No one is left wondering what the status of a project is, there are fewer interruptions, and perhaps the most valuable reward is the ability to plan projects and assign resources easily, effectively, and efficiently. Additionally, everyone will see a sharable view of your team's workload, giving your team the peace and recognition they deserve. Best of all, this all adds up to gaining time to focus on getting the right work completed in the right amount of time by the right people, every single day.

An effective resource scheduling tool can help to visualize the entire scope of work and manage team resources efficiently.



Connect the right work with the right people

Workfront's revolutionary resource scheduling gives team members the ability to reference one source of truth for work and project assignments, resource and project managers the capability to know that the most strategic work is assigned to the best-suited people, and confidence for executives in knowing the right people are working on the right projects.

With an Enterprise Work Management solution like Workfront, your team will enjoy:

- A single view of the work that matters most
- One calendar that captures it all
- A more effective way to prioritize assignments and plan resources
- Ability to easily pivot to address changing requirements
- Streamlined work management

workfront.com/resource-management

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