

Whitepaper

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# PMO Leaders: Plan, Manage and Measure Resources Expertly That's Our Jam

Your most critical assets are your resources—get them in tune with strategy

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**TAKEAWAYS:**

1. Resource management expertise is crucial, perhaps the key enabler in most industries, to both project success and stakeholder satisfaction.
2. Planning, managing and measuring resources requires a specific skillset from your PMO. These resource execution fundamentals help you build a strategy to withstand change.
3. Adopt the skills for planning, managing and measuring resources to ensure a greater effectiveness and alignment to strategy.

“You can bring harmony to your business partners and become a trusted, strategic member of your leadership team. Looking at three key capabilities: planning, managing and measuring...”

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## Introduction: Music to Stakeholders' Ears

Nearly every industry is dealing with unprecedented digital disruption and the all-encompassing hunt for customer experience mastery. The project management office (PMO) is becoming a crucial communicator and enabler of business goals for stakeholders up and down the customer value chain. Low PMO process maturity contributes to resource utilization failures as does low adoption rates and poor utilization of resource management tools. Utilizing best practices for planning, managing and measuring resources, however, can help you engage and retain the best resources, improve profitability and prove your PMO's value to the organization.

As a portfolio manager who masters resource management, you can bring a much-needed harmony to your business partners and become a trusted, strategic member of your leadership team. Looking at three key capabilities: planning, managing and measuring, will help you get in tune with the business goals your company must reach to remain relevant in rapidly changing industries. You will create the music and lead the company through many standing ovations.

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## Planning that Prioritizes Your People: Five RM Best Practices

A cohesive set of metrics that guide resource and project managers, along with shared tools and best practices, deliver project excellence in terms of execution and stakeholder value. As the music maestro assembles the talent to perform the tune, the PMO leaders and resource managers staff the organization to meet demand. Prioritizing the right people to work across the enterprise is easier when you can utilize a strong skills database that provides critical information about the supply of resources. We suggest aligning by “planning backwards” —from resource data you've gained through a fully featured PPM solution, and being flexible every step of the way.

A common business problem is when the resource teams and project teams are running along in their own lanes with no visibility into why or how each makes allocation and utilization decisions.



Here's how to combat that resource/project specific myopia:

### 1 Focus at the Portfolio Level: Get the Beat

If you create a portfolio-level strategy, you'll be able to continually optimize resource planning. This works because it doesn't inhibit you from effecting change quickly in response to business innovation needs.

### 2 Flag Issues Early: Look Ahead

Just as a band requires a lot of practice to identify issues before a big show, the PMO must plan using excellent forecasting and scenario modeling processes to practice what options should play out and "tell the fortunes" of projects accurately to avoid costly emergencies. Your system should identify red flags earlier and create contingency plans that meet everyone's needs.

### 3 Seek to Understand: Earn a Gold Record with Sponsors

You will gain trust if you can capture best practices that consistently create a planning process- from idea to intake to execution - that includes a deep collaboration with cross-functional teams. Project managers and resource managers can work together and plan for a resource management process that works and replicates projects as they are completed and enter the system.

### 4 Get a Comprehensive View of Resource Supply - Know Your Band Members

You've gained a comprehensive view of the supply of resources by knowing the difference between their capacity and capability. Continually measure against these two things to understand:

- What kinds of skills you now possess?
- How to accurately manage the gap between these skills and the work you need to complete on the portfolio level.
- How to move your organization to plan against portfolio and enterprise impact and not just project-by-project.
- How to give RMs and PMs a single, enterprise impact view to gain control of supply gaps.

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### COMMON RM RED FLAGS:

1. Changes in people's behavior—quiet folks get more vocal, vocal folks clam up.
2. Frustrated body language—if you notice more commonly stressed resources, you can't always say “it must be the deadline.”
3. Changes in performance or quality across the board, not just individual changes, point to systemic issues.

### 5 Beyond Hard Skills: The Multi-Instrumentalists

Most of our projects need specialists, not generalists. As an example, even if developers have a few languages they've mastered, they must also possess soft skills to excel as project team members. In the music industry, artists like Prince who can write songs, play nearly any instrument and perform as an awesome entertainer are far and few between. Ensuring you plan to allow for both peer development and soft-skills development ensures your clients aren't trying to manage your resources' lack in these areas and thus not receiving the service they deserve.

Gaining a mastery of soft-booking resources with provisional planning, will allow you to balance workloads across the portfolio's resources prior to assigning them. If you've done so, you can pivot quickly with the best possible resources to meet the increasing speed of change in your industry as well as confidently show all stakeholders what your allocation plan looks like now—and in the future.

## Resource Management Masters: The Producers of Excellence

If you've ever been in a music production studio, or watched a documentary of the world's best producers—Phil Spector, Mutt Lange, and Jay-Z come to mind—you know they're the masters of the process. No matter how the song is morphing, or how many elements they must keep track of, they keep the end result in mind, a vision that will benefit both the artist and the record company's sales (or streams).

Likewise, in this changing PM environment, portfolio managers must always keep the strategic benefit of every decision top-of-mind. Project teams are expected to execute against benefit. At the same time, they've been given more autonomy and shorter timelines. Managing to this environment requires working on the right projects at the right time in the right order—and, more often than not, doing it with less. If you want to play to crowds that are cheering instead of booing, follow these steps:



### 1 Access Your Execution Strategy – Talented or Tone Deaf?

Accessing your execution of resource plans requires a clear-eyed view of how well you can allocate resources and analyze changes at the portfolio level. You may not always be able to identify red flags and key indicators early and often or be as proactive as you need to be because

## SOLUTIONS:

1. Look for anomalies.
2. Identify root cause, NOT symptoms.
3. Identify next steps—don't worry if you determine the next step is “do nothing” and the problem will solve itself, or you could get dramatic—if you need to, act quickly.

you don't have a way to create contingency plans and analyze the impact of change to the entire portfolio.

Gaining an idea of how to centralize your resource management and moving toward that goal will create a PMO that executes to strategy more often.

## 2 Remain Agile—Without Losing Strategic Direction

We're not talking about agile projects, or even managing an agile team, but ensuring your ability to adapt to changing demands with resources. If you've got outdated information; too much data associated with a project; if you've over-allocated utility players; or don't have bandwidth for exploratory projects; if you have project tunnel-vision by not looking across the portfolio but project-by-project; and if you don't have soft skills represented in your database, you may be suffering from a lack of agility.

PROJECT REQUIREMENT	RISKY	PROJECT-ORIENTED	PORTFOLIO FOCUSED
Resource Pool	1:1 skills to people	Some overlap of skills	Ample coverage
Skills database	Nonexistent	Not reliable	Accurate, up to date
Team Communication	Minimal, written	Consistent, rich	Open, available
Resource Utilization	Always operating at 100%	High, with some bench	Optimal
Resource Tracking	Not updated, true up at the end	Mostly right, some additions needed	Real time, reliable data
Team Structure	Bureaucratic, multiple approvals needed	Fill ins are easy, not long term	Built-in coverage, always know who is fallback
Ability to Change Direction	Ruins things, avoid at all costs	Changes happen but cause delays	Easily pivot and keep moving
Management Involvement	Needed for all resource deployments	Updates without approvals	Only when problems arise
Planning Approach	Rigid, stick to the plan	More of a guide than directive	Continuous
Process Philosophy	There's a process for everything	Overkill, but we work around it	Minimal, created as needed

“The metrics that matter will make the difference between disharmony and a PMO in concert with business goals. Aligning resources to changing demands requires portfolio-level oversight, so you can identify red flags on the portfolio level.”

The chart below illustrates what to manage to reduce risk and remain portfolio focused in your resource management response.

### 3 Allocate and then Iterate: Change Happens, so Change Your Tune

Being able to respond effectively to change will mean the difference between success and failure for most portfolios—success measured by strategic impact and meaningful benefit—whatever that looks like for your industry. Soft book and create contingency plans for your most valuable resources. Create draft resource plans and gather everyone in the room who needs to know, to discuss and optimize.

### 4 Navigate Resource Management by Hitting These Notes

Keep the lines of communication open during every stage of the project among stakeholders and back up decisions with solid data. These best practices include:

- a. Keep resources properly informed with great dashboards and easily-configured reports.
- b. Ensure communications can be real-time and interactive, so conversations about resources remain clear and collaborative.
- c. Be able to show utilization for the entire portfolio, not just snapshots of projects in different silos.
- d. Acquire the technology necessary to enable synergies between project management and resource teams; resources and their executive leadership; and for all stakeholders on a configurable, need-to-know basis.

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## Measuring Against Four Metrics: The Best Chords for Every Song

The metrics that matter will make the difference between disharmony and a PMO in concert with business goals. Aligning resources to changing demands requires portfolio-level oversight, so you can identify red flags on the portfolio level. What's more, you make sure to create contingency plans based on impact analyses run in a single, centralized resource allocation platform. It takes discipline. But like the old joke goes--How do you get to Carnegie Hall? Practice!

The first step is to measure how your teams and individual members are delivering work. Do you produce a result, even in the face of accelerating change? RM and PM leadership must examine utilization rates as well, to identify if they've created an environment that protects margin.

Finally, project success rates that continually improve are the goal—even if you're not where you need to be, you can get there with a focus on four questions:



#### How do you identify problems? Tuning in and turning it up

The first thing we need to consider is that traditional performance measurement processes no longer apply. Task execution and even delivering on-time are not the end-all and be-all of performance. People are no longer simply assigned to execute tasks—expectations and standards for soft skills and adding value are paramount to creating strategic alignment in the markets and for customers. In this environment, performance may be less consistent because work is more diverse. High customer expectations may be an opportunity to add value to a contract or use the event to address an underlying issue.



#### How can you create the right environment? Improvising to melody

First, it's key to keep a single end goal in mind: Environments must outlast people and individual projects. You've seen the negative converse of this, when you inherit poor practices and processes from a former PM leadership team. To create the right environment, you'll need to invest time and effort and then ensure your project and resource teams can work together to garner consistency among all roles and in all levels of the organization. Cross-functional teams must commit to the process and work hard to gain buy-in from everyone if your environment will yield the kind of strategic impact your sponsors require.



#### How do your teams drive improvement? Raising the bar

How can you drive sustainable change, year over year, project over project? Here are three things you can do to enhance this ability:

- a. Understand current performance levels first –this will take some hard truths examined in an environment that's collaborative, not punitive.
- b. Establish future standards—once you've seen gaps in performance, it's crucial to form a vision of excellence you can all live with, and then, plan to get even closer to the ideal by revisiting your progress regularly.
- c. Execute plans to bridge the gap between current performance and target performance—the plans must be actualized across all levels of the organization to ensure sustainable change takes place. The following chart provides an outline for you to use to identify the topics you should have in a PMO performance improvement program.



#### 4 What is everyone's role? "All together now..."

Consistently optimized performance requires everyone's engagement, from leadership to PMO teams to project managers and resource managers on-the-ground. Visible commitment to change will look different to all of these stakeholder groups, but creating a process that allows for collaborative and aligned action will be key to success. Take the time to clearly delineate expectations for everyone and ensure that communication and clarity rule the day. Accountability must be baked-into the project, as well, to ensure that everyone is aware that each person's contribution will be crucial to achieving change.





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# Plan, Manage, Measure Resources to Create Melodious Change

“Ensuring that your PMO plans resources to pivot and respond to innovation; creates an environment of high-quality and high-performance responsiveness while managing to plan.”

We’ve given you a lot to work on with this white paper—however, by first taking a step-by-step approach that starts with reviewing your planning—then looking at allocation habits, and finally, by measuring your success and replicating it consistently, meaningful change will be in the grasp of your PMO.

If these stages of resource management have one thing in common, it’s this: They must be centralized, and enterprise-wide to make sense. You will need a way to automate day-to-day administrative tasks to be able to uncover earth-shattering, strategically impactful tasks (cue drum kit) that allow you to excel.

Ensuring that your PMO plans resources to pivot and respond to innovation; creates an environment of high-quality and high-performance responsiveness while managing to plan; and measures how to deliver on this quality, year-over-year in an environment of powerful and productive action may seem difficult, if not impossible. Yet these strategies are within your reach—challenging, but worth it to ensure you’ve become the strategic engine for both building stakeholder trust and business growth. Getting it right with resources every time? That’s our jam.



## About KeyedIn™ Projects

KeyedIn Projects is a supremely flexible solution for managing projects, programs and entire portfolios – from a single platform that provides a comprehensive view of the status of every project. Used by project managers, boardroom decision-makers, and frontline users, KeyedIn Projects increases success rates and profit margins, enables better decisions about project selection, planning, and prioritization and optimizes resource usage across the entire business. Headquartered in Minneapolis, KeyedIn has hundreds of customers worldwide, including Walgreens Boots Alliance, LexisNexis and OfficeDepot.

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