When Your People Are Engaged, Your Projects Really Move
In a fast-changing app economy, agility and alignment are king. Without these attributes, it’s difficult to address top priorities around growth, customers and workforce. Organizations need to know that they’re developing and delivering the solutions that customers want when they want them. That means aligning the right resources to best-bet projects in order to roll out new offerings on time and within budget—and ultimately deliver value to the business.

Like many who oversee resource management, you may have found that this is easier said than done. In fact:

- **72%** of business leaders aren’t satisfied with the time it takes to derive insights from data.\(^1\)
- **63%** of companies defer to executives to decide when to eliminate/postpone projects.\(^2\)

Situations like these can cause delays and impact decision-making—all of which thwarts your ability to leverage resources in support of your business strategy. You could end up resource-bound and behind schedule with little to show for your efforts. So it’s no wonder that 75 percent of business and IT executives anticipate their software projects will fail.\(^3\)

Clearly, effective resource management is essential to your success. So what’s getting in the way?
Coping with Ineffective Resource Management

There’s no single problem causing your resource management concerns. The larger challenge lies with the tools your team is using. They simply weren’t designed for the way people actually work to complete day-to-day tasks. More often, they were built from a project-management versus a resource-management perspective that left serious gaps:

- No easy way to perform everyday tasks, like obtaining staffing approvals
- No linkage to financial forecasting and modeling capabilities
- An inability to communicate in context with other team members to help solve problems
- A lack of drill-down capabilities to access required information
- Difficulty determining which resources are relevant to specific projects

That’s why nearly everything your resource managers and project coordinators try to accomplish takes more time and effort. So how can you ensure that your team can respond more quickly to changing business priorities?

The ability to pivot and align resources with shifting business priorities can create tremendous competitive advantage and business value. But first, you need to be able to answer some critical questions:

Who’s working on your company’s most crucial initiatives?

What’s funded and how spend is tracked on each initiative?

Are you tracking to deliver initiatives on time?
Overcoming limitations in your current resource management environment is possible when you can leverage tools with a built-in understanding of the human interactions involved in performing individual tasks. Under this approach, the responsibilities of a specific role and supporting capabilities realistically map to the way people work.

As a result, you’re able to simplify the performance of daily functions and promote a more collaborative and productive environment. At the same time, you can help speed and strengthen decision-making among resource managers, project coordinators and other stakeholders.

Let’s look at some common scenarios to see how this could apply to your organization.

**SIMPLE**
Removes the complexity of staffing requests and approvals

**POWERFUL**
Facilitates key insights for accurate decisions for staffing and delivery

**PRACTICAL**
Drives collaboration with contextual conversations for staffing negotiations

**PRODUCTIVE**
Simplifies reporting work about work so teams can focus on delivering value

When you elevate your resource management capabilities, you help your organization become an agile enterprise.
Like most resource management teams, the roles and responsibilities of its members are well defined. The same rings true at Arcadia Systems,* where Derrick, Barb and Susan work as productively as possible to produce results that benefit the organization. The trouble is, internal processes and tools are often stacked against them. But the urgency to roll out enhanced mobile services to improve delivery operations isn’t going away—worse, the team was just advised of another critical project that must get underway soon.

*Arcadia Systems and its employees represent a fictional organization developed for the purpose of the scenarios that follow.

### EVERYDAY CHALLENGES

**Derrick Joseph, Resource Manager**
- Mapping headcounts to business initiatives
- Forecasting changes in headcount
- Identifying staffing conflicts
- Dealing with unplanned activities

**Susan Johnson, Executive Leader**
- Prioritizing and funding initiatives
- Ensuring strategic alignment
- Responding to change

**Barb Hudson, Project Coordinator**
- Keeping everyone informed
- Finding teams for her people
- Tracking down people
Simplify Staffing Through Centralized Visibility

Working as a resource manager for several years, Derrick Joseph is still not sure that he has headcount focused on the right work. The problem is, he can’t get a single view of what all his people are currently working on or what’s in their queue. Derrick does his best to identify the optimal resources available, but it’s hard to know whether he’s properly assessed the potential impacts when reassigning staff. He also worries that complex approval workflows for staffing requests are causing too many delays.

Using CA Project & Portfolio Management (CA PPM), Derrick could move forward more confidently thanks to:

- A consolidated view of all resource activities, including FTEs, part-time employees and outside contractors
- Drill-down capabilities into project assignments and allocation percentages
- The ability to shift from a “people view” to a “projects view” to evaluate interdependencies
- An intuitive, visual resource request and approval process that doesn’t require workflows

In this view, Derrick can see all his resources and quickly assess their availability.
Determining the potential value of business initiatives is an onerous task when you can’t easily get your arms around all the information needed to forecast and plan. As an executive leader, Susan Johnson has been dealing with this issue since the resource management tools her company employs lack financial forecasting capabilities. So when a new strategic priority emerges, how can she be expected to turn on a dime to plan for and fund the best project?

**CA PPM offers a financial forecasting capability** as part of its resource management tools, so Susan can:

- Model plans to meet budgets
- Map headcounts to business initiatives
- View resources mapped to investments
- Perform financial model scenarios
- Support software capitalization processes

**RESPOND WITH AGILITY**

When forecasting is integrated into resource planning, your organization can understand what people are working on, what it’s costing and how to impact those costs by adjusting variables. In other words, you can enable enterprise agility.
Communicate and Collaborate

Like project coordinators everywhere, Barb Hudson’s goal is to find teams for her people as quickly as possible. She submits her request for resources and hopes that she’ll get a quick response from Derrick, her resource manager. The trouble is, it takes Derrick time to uncover candidates suitable for a given project since he needs to employ multiple search criteria to identify them. For example, while a certain engineer may have the best skillset, can she start when needed—or is she actively working on another high-profile initiative? This situation leaves Derrick constantly checking workflows and calling or emailing Barb, or other stakeholders, for clarification on project status and impacts.

CA PPM helps you enable project coordinators like Barb to engage in collaborative negotiation with Derrick and other team members. Together, they can determine how to best use existing resources—shifting high-demand staff from one project to another as needed—to facilitate timely staffing.

Through a practical, embedded social collaboration tool, they can:

- Obtain quick answers about skillset, availability and other resource requirements without leaving the tool
- Communicate in context with other stakeholders who can assist in decision-making or problem-solving
- Post or respond to comments with @mentions and alerts

Embedded social collaboration helps expedite resource negotiation between Derrick and Barb.
Help Your Teams Further Sharpen Focus and Clarity

If your resource managers only performed long-term planning or just tracked future resource issues, they’d have far fewer variables and circumstances to deal with. But in reality, they could be planning and tracking issues quarterly, monthly or even weekly. Unfortunately, your current tools aren’t equipped to easily drill down into such granular details. With CA PPM, your resource managers can employ telescoping to zero in on a specified planning period in order to locate and resolve bottlenecks.

A pinning feature enables them to further isolate problems, making it easy for managers to use Excel®-like tools to balance workloads.

Similarly, your resource managers can use telescoping to help them find the right resources at the right time. In concert with the pinning feature, they can avoid searching through potentially hundreds of candidates and pull two or three candidates into a separate view for comparison and evaluation.

Use telescoping to zoom-in on specific planning periods.

Isolate problems or available resources through pinning.
Combine Oversight with Agile Delivery

When your developers spend excessive time capturing “work about work,” they have less time to add value to the business. What if they could better account for their time and stay productive while you gained greater insight into your budget, costs and headcount activities?

CA PPM has solved this problem by integrating its time management module directly into the CA Agile Central user experience. This approach improves data accuracy while delivering important benefits, including:

- **360-degree visibility** into both PPM resources and agile teams, so your resource managers can see (and report on) the total headcount across the portfolio
- **Better budget and cost management** through tracking both internal and external labor, as well as the amount of money remaining in your annual plan

• **Easier headcount justification** by identifying which of your projects are understaffed
• **The ability to facilitate software capitalization** by providing the evidence your finance team requires

Engineers can easily record work as it happens through timesheets embedded into their CA Agile Central environment.

**CROSS-FUNCTIONAL VALUE**

Working together, **CA PPM and CA Agile Central** remove disconnects and risks by providing holistic visibility to help ensure every project meets your strategic goals. In real time, your resource managers can see what’s stalled and what’s progressing. And your business leaders can **make data-driven decisions based on deep organizational insights**.
Your organization may be running dozens or hundreds of initiatives. And you need to ensure that your team’s efforts are strategically aligned to produce the best results. That means avoiding wasted resources while helping individuals excel both in their roles and as part of a high-performing resource management team.

CA PPM helps you achieve these goals through capabilities that:

- Replace complex workflows with simplified, more intuitive resource request and approval processes
- Facilitate financial forecasting, leveraging modeling and scenarios
- Promote collaborative negotiation and communication in context
- Address staffing requirements and issues with greater precision using telescoping and pinning features
- Integrate time management into the CA Agile Central user experience
Take steps to improve resource management today. Because when your people are engaged, your projects really move.

Learn more about [CA PPM resource management](#) today.