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# 5 Tips + Tricks: Resource Management



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# Your hosts



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**Resource management is at  
the heart of delivering  
successful client work.**

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# How to participate today



## Q&A

Use the Q&A to ask your questions



## Emojis

Use emojis to show us your reactions



## Chat

Use the chat to say hello or leave a comment

# Recording



We are recording and it will be emailed in a few days.

**Don't worry!**

# What we'll cover



## Foundations

Understand the core resource management foundations to build your strategy.



## Long-term Planning

Plan longer term for future projects and ensure sustainable growth.



## Short-term Capacity

Check short term capacity to manage immediate workload effectively.



## Team Utilization

Get visibility into team utilization to optimize your workforce.

# Scheduler

vs

# Planner



## Longer term forecasting

High level planning of client work against available resources.



## Identify the need to Hire or Sell

Understand where the gaps are and ensure no money is left on the table.



## Optimising Business Capacity

Used by larger Services firms to ensure resources are allocated efficiently.



## Manage capacity efficiently

Ensuring teams are working to full capacity on a day to day/week to week basis.



## One stop shop for Capacity Planning

Facilitates more granular and more accurate planning with an at a glance view to stay on top of teams work and see where the gaps are.



## Facilitate the ever changing environment of client work delivery

Quickly assign and edit tasks and identify where the gaps

# Thank You!

