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ITSM

Be on Top of your
Resource Planning

Businesses today must have control of their resource handling to be cost effective and stay in business. Having control is important not least to the IT Service Organizations that often operate with high costs and many deadlines, and are in constant need of prioritizing their efforts. With access to critical information about your workforce's availability, skills and competences, and not least its costs, efficient resource planning can be made and resource requirements be determined early in any task or work – thus making it likely to be completed in time and at the expected cost.

The right Resource Management Software

There are tools designed for supporting the Service Organization with both operational and strategic information concerning the workforce. When choosing the right resource management tool, it might be worthwhile considering a full service management solution that includes strong resource management functionality integrated to the service management processes.

Synchronizing external appointments in MS Outlook with work allocations in a good service management tool provides a total overview of workforce availability. Combined with skills and competence settings on each individual, this enables planning of future activities and allocating of resources for daily operations. Furthermore, when time used and items consumed are registered and considered, you get full cost control.

For resource planning and handling you should consider:

Skills

When allocating resources it is crucial to know what skills and competences each resource (person) has. When skills and competences are defined on each resource (person), and is aggregated to the related support group and the whole service organization itself it is easy to choose the right resource for the job.

Availability

Availability overviews of your workforce are essential both for planning (strategic) and assignment (operational). With synchronization between the MS Outlook Calendar and the user calendar in your service management tool you get a complete view of all allocations assigned to the workforce. Availability presented in Gantt charts, combined with competence information, makes it easy to plan for upcoming work tasks (changes, releases, projects) and assign ongoing service tasks to the correct resource – based on availability and competence.

Time control

It is important to be able to document time used and items consumed (e.g.spare parts, components in the IT infrastructure, software, travel costs, etc.) on every work task executed in the Service Organization. When all used resources are logged you have the basis for calculating the costs of a job.

Cost revenue

Cost information on each user (employee) combined with the information from the logged resources (time and items) used, give the Service Organization complete cost control. It should be possible to aggregate costs on any entity within the CMDB such as Incidents, Service Requests, Changes, Projects, Services, CI Types, Customers, etc. And combined with your service management tool's invoicing functionality you should be able to invoice your customers for the services provided, if relevant.

A Complete Picture of Availability

An important feature is the synchronization against the MS Outlook Calendar. This is mandatory in order to have a complete picture of availability.

The search engine for resources having specific skills combined with their availability is a powerful tool both for planning and assigning of ongoing tasks. Imagine a scenario where the Service Desk does not know exactly to whom they should assign a Service Request or Incident, the Project or Change Manager needs a resource with a specific skill set for two hours the following Tuesday, or the Financial Department needs a new budget report from the General Ledger (GL) system within a week, etc.

When you talk to your customers you can guarantee a delivery date just by checking the availability Gantt chart listing resources with the required skills. First, you book the required resources directly in the Gantt chart by use of the pre-allocation feature, then you give the customer a due date for when he must accept the offer, and set a removal date for the pre-allocation according to the due date given to the customer. If the customer then rejects the offer or does not reply, the pre-allocation is automatically removed and the resources become available again. If the customer accepts the offer, you define the change, project or service request in your service management tool with the allocated resources and the pre-allocations are exchanged with real allocations.

Always on Top of Things

Businesses today must have control of their resource handling to be cost effective and stay in business. Having control is important to all aspects of the business, not least to the Service Organizations that often operate with high costs and many deadlines, and are in constant need of prioritizing their efforts.

When you e.g. ask the Service Manager what the cost is to develop a certain service (from requirements state to released state), he should know. He should also know what the monthly cost is to keep a certain Service
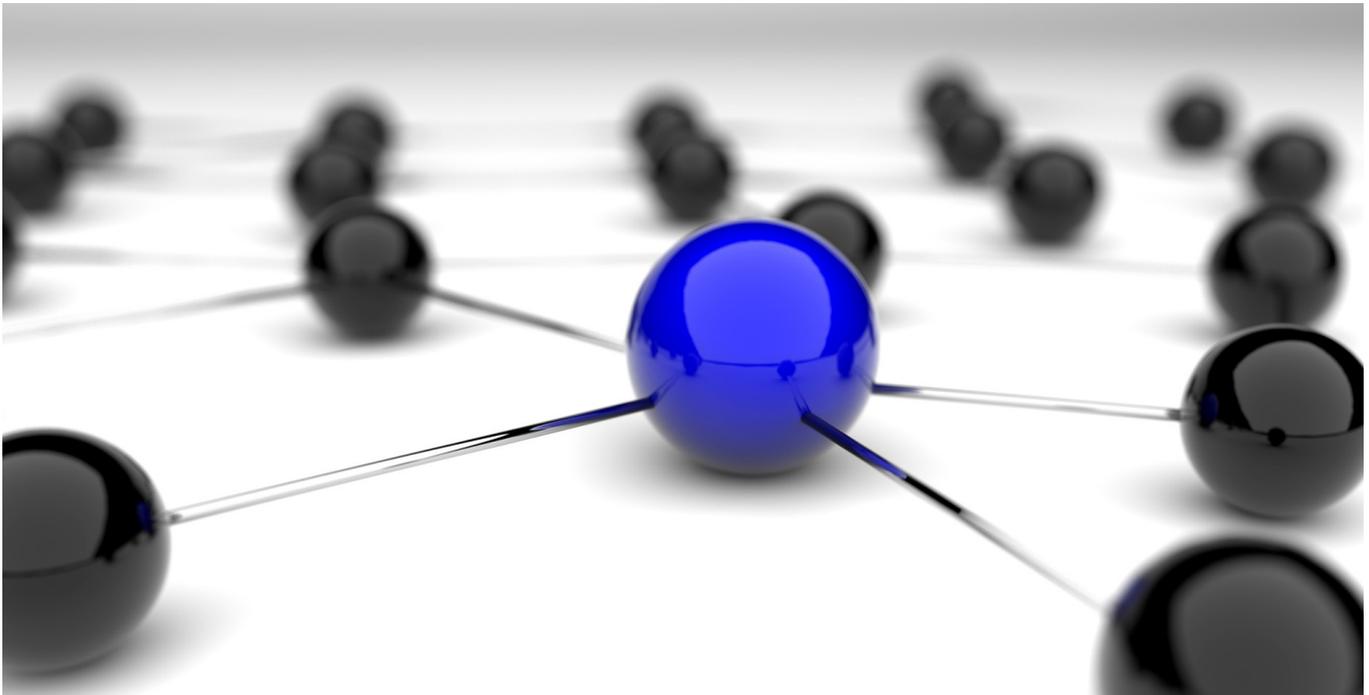
operational. The Service Manager is just an example – also the Project Manager, the Incident Manager and the Change Manager, should know the costs and availability of their resources.

If you ask the Technical Department whether they can set up a new Oracle DB Server, they should know whether they have the resources available to complete the task on time.

Similar questions can be asked for most of the processes handled by the Service Organization. A lack of underlying data aggregated on different entities would result in uncertain decision-making, whereas having an exact overview of the costs and availability of resources is crucial for making the right prioritizing.

To summarize; correct decisions can only be made with access to exact information:

• Do we have workforce capacity?

• Do we have the workforce competence?

• What will it cost?

Know your Exact Costs – Right Down to the Relevant Entity

With the right service management tool, your organization gets a unique tool for handling human resources and their related costs. You get a superior overview of skills and competences within your organization, time used on different tasks, efficiency, resources' availability and their cost. Their cost is already known in the HR and GL systems (salary cost), but with resource handling in a good service management tool you can split the costs down on relevant entities in order to measure exact costs on Changes, Releases, Projects, Incidents, Service Requests, Services, CI Types, Customers, etc. This

information is essential in several ITIL disciplines such as Demand Management, Service Portfolio Management, Financial Management for IT and Continual Service Improvement.

If you would like know more about Resource Management in general, or POB Resource & Time Management in particular, please contact your local Wendia office or partner or reach us at info@ wendia.com.

When choosing the right resource management tool, it might be worthwhile considering a full service management solution that includes strong resource management functionality integrated to the service management processes.

This text about being on top of your resource planning was written by Atle Nilssen.

Atle Nilssen, now Senior Consultant in Wendia Norway, has massive experience with Service Management - follow him on LinkedIn.