



**rego**University 2021  
VIRTUAL

RMO | Creation And  
Optimization

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# Part I: Defining the RMO



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# What Problems Are We Trying to Solve?

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- We don't know who is working on what on an enterprise level.
- I keep hearing we don't have enough people to do all the work; is this true? How would I know?
- Resource planning and forecasting is ad hoc, via spreadsheets, via multiple systems, difficult to get a clear picture beyond the next few weeks...
- I don't have visibility into resource issues ahead of time, only when conflicts arise.
- Why am I still seeing resources in my team that left the company 6 months ago?

**Who owns trying to figure this all out?**

# What Does An RMO Actually Do?



## TACTICAL RESPONSIBILITY

- Resource Data
- Resource Management Process
- Resource Management Reporting
- Time Entry Compliance
- Resource Forecasting Compliance
- Resource Manager Training / Mentoring



## STRATEGIC RESPONSIBILITY

- Strategic Labor Reporting
  - Strategic vs Support Cost
  - Role Capacity vs Demand
  - % Of Contractor vs Internal
- Vendor Management Performance
- Organizational Change Management

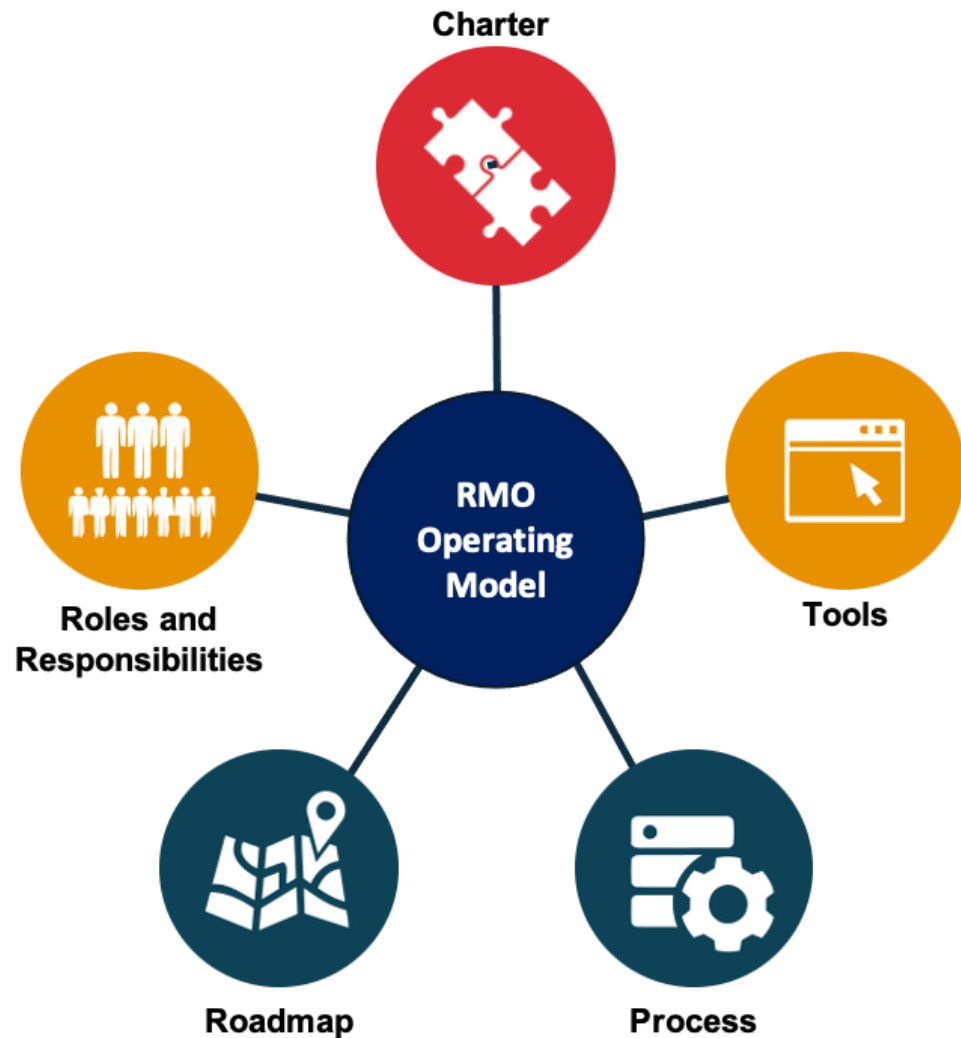
# Part II: RMO Operating Model



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# RMO Operating Model



The Operating Model defines the structure of an RMO, the roles and responsibilities of the team, and the role the RMO plays supporting the organization.

# Components of the Operating Model

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- 1. Charter:** Purpose and goals of the RMO
- 2. Tools:** Software and reporting tools required to support the RMO
- 3. Process:** What business processes will the RMO own/ not own? How will the RMO ensure process is followed, data is accurate? How will the RMO factor into decision making?
- 4. Roadmap:** What capabilities will be rolled out, and when?
- 5. Roles and Responsibilities:** Who will do what within the RMO?

# Roles and Responsibilities of the RMO

| Role                          | Description  |
|-------------------------------|--|
| <b>RMO Lead</b>               | Develop, own, and mature resource management processes, RMO operations, and reporting cadence in support of the RMO Charter.<br>Works with senior management to understand portfolio priorities and associated resource impact.<br>Helps define strategic Resource Management targets and reports. |
| <b>Data Analyst</b>           | Pulls standard compliance reports for time tracking and forecasting. Ad-hoc reporting of Clarity data.<br>Analyzes data to understand trends, areas of excellence, areas for improvement.  |
| <b>Process &amp; Tool SME</b> | Assists with ongoing mentoring and training of Clarity Resource Management and Project Management users. Mentoring activities including 1:1s, workshops, open office hours, and ad-hoc training as needed.   |
| <b>Analyst</b>                | Reviews the data and works with resource and project managers to ensure that all resource related data is up-to-date and accurate. This can include rate, cost center, role and organizational categorization of Resources.  |



*These roles can be combined or separated depending on the organization*



# Part III: Process & Policy



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# RMO Processes – Resource Data Governance



RMO needs to ensure that all data being reported is accurate and complete: Resource meta data, Actuals, Allocations, Role demand.

Determine the value proposition of using Clarity's Skills capability for Resource Management.

The basis of all good RMO practices and reporting begins with data governance.

Measure and trend KPIs for resource management processes.

# RMO Processes – Time Entry



The RMO manages the time entry process

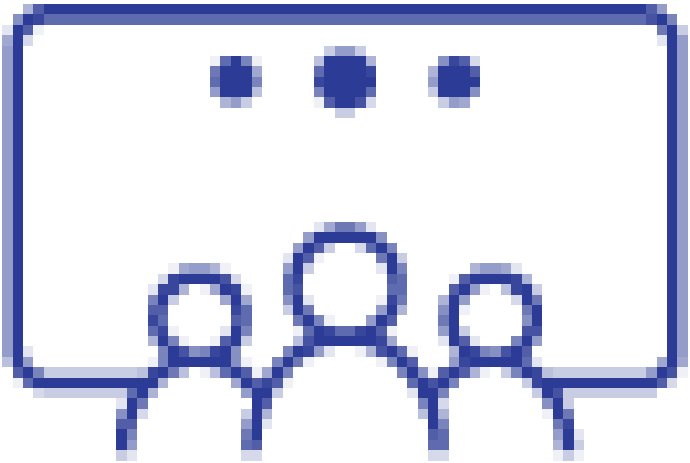
- Who must enter time?
- Who will approve time?
- Cadence for submission?
- What time periods are open?

This results in compliance reporting

- The Naughty List

Tip: Consider recognition for teams who are consistently compliant over time

# RMO Processes – Resource Planning / Forecasting



RMO will manage the Resource Planning and Forecasting process.

- Role, Resource, or Team Allocations
- Who can add resources or roles to investments
- Allocation vs ETC demand
- Soft vs Hard Booking
- Formal requisitions
- Booking status

# RMO Processes – Vendor Management



RMO will need to engage in some vendor management activities and reporting.

- Onboarding of Vendors in the PPM Tool
- Onboarding of Resources in the PPM Tool
- Pre-set Term Dates
- Ensuring Offboarding process
- Resource Vendor Changes
- Transition from Vendor to Internal
- Rates
- T&M vs Fixed Cost
- Vendor Based Reporting

# Part IV: RMO Reporting



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# RMO Reporting Strategy

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The mature RMO is responsible for two levels of reporting:



Project / Resource Manager Level Reporting on Capacity vs Demand



Strategic Enterprise Level Reporting – Cost Center, Department Role, and Internal vs External Labor

# RMO – Project / Resource Manager Level Reporting

## Project

- Resource is not overutilized within one project
- Views to see key resource utilization across investments
- Pending Actuals
- Last timesheet posted

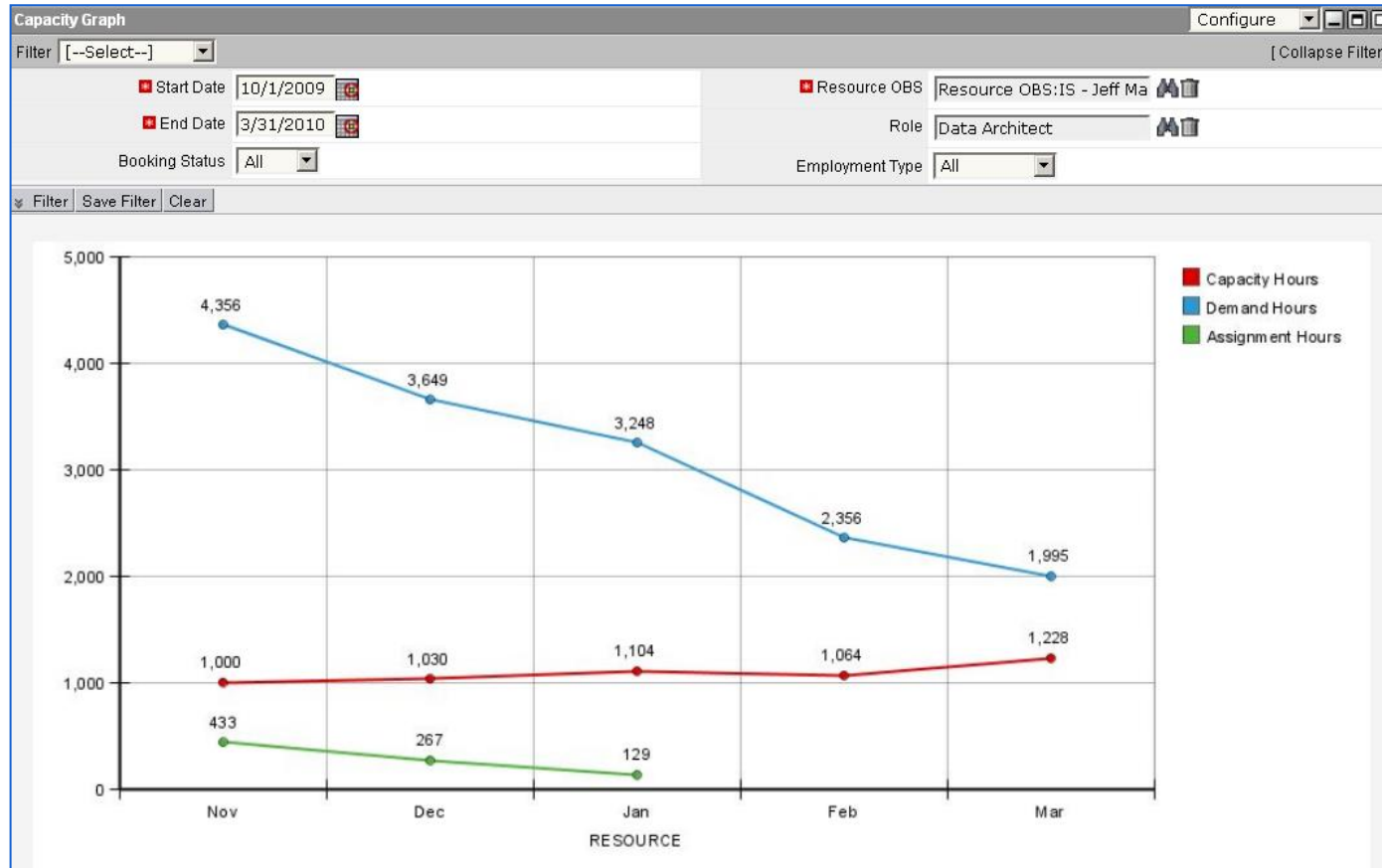


## Resource Manager

- Views of Allocation, Assignment, and Demand by Resource Manager, Cost Center, Team
- Resource Manager Level Timesheet Compliance
- Resource Manager Level Forecast Compliance



# RMO – Project / Resource Manager Level Reporting



## Good Places to Start:

- Capacity Graph
- Resource Availability – 4 Weeks
- Weekly Detail
- Resource Workloads
- Unfilled Requirements
- Allocation Discrepancy
- Capacity – Role Capacity Histogram
- Organizational Demand – OBS Resource Aggregation
- Organizational Demand – OBS Investment Aggregation
- Down Planning – Top Down Planning by Investment
- Last Login

Black = OOTB

Blue = Rego Exchange

# Part V: How Do We Get There?



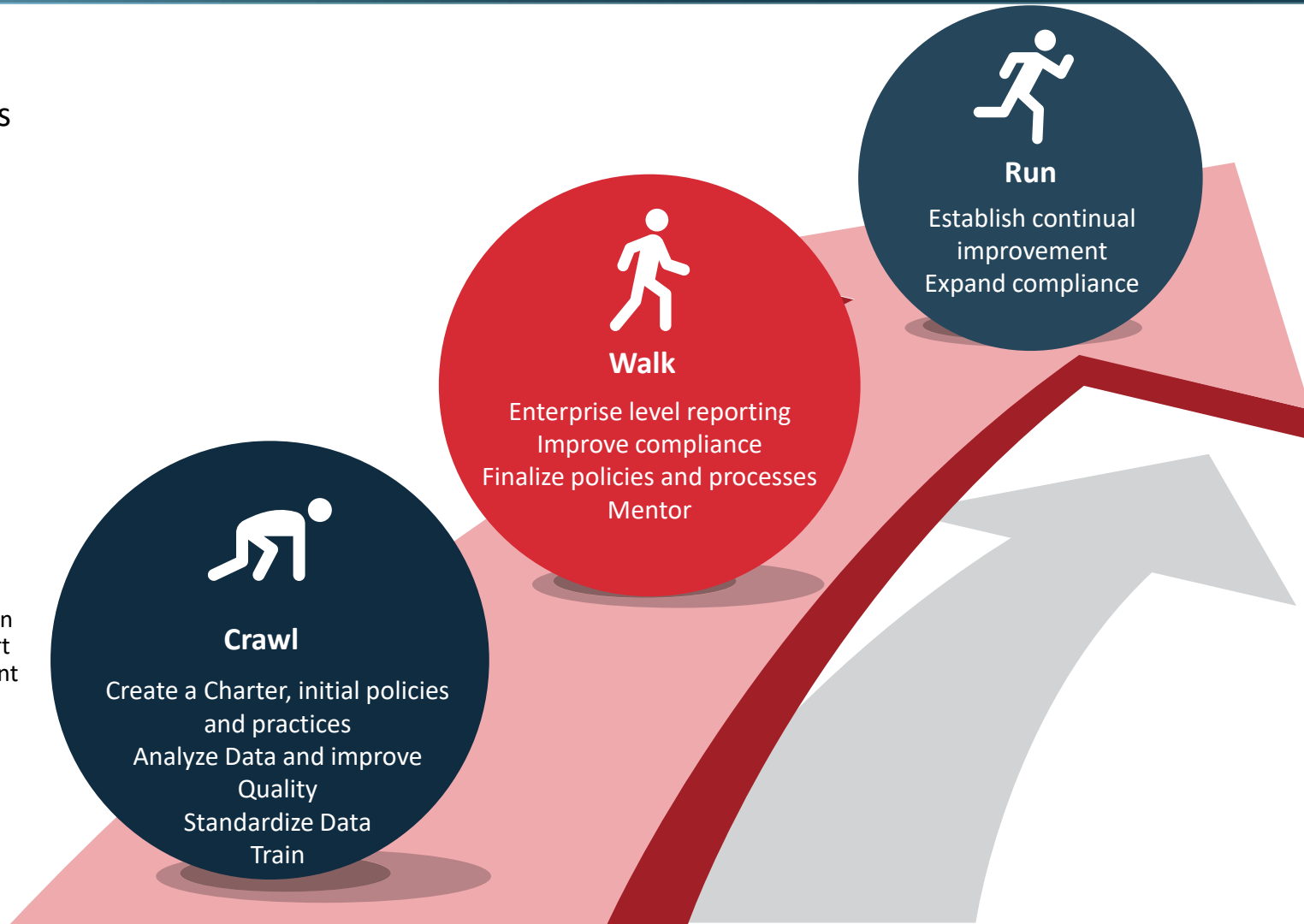
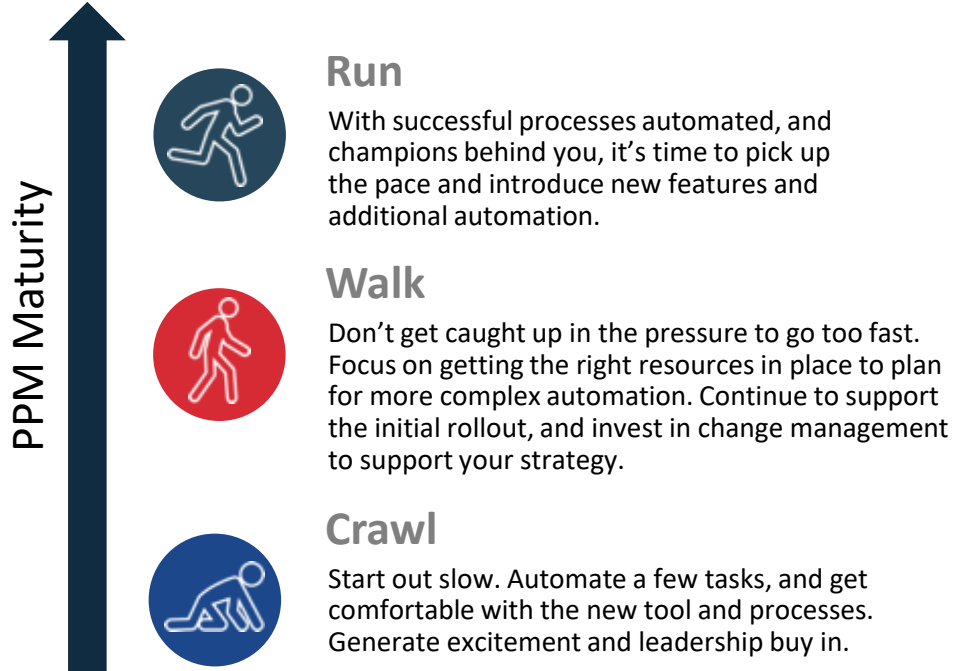
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# RMO – Assess Where You Are

| Capability                                   | Maturity | Current Challenges   |
|--|----------|--|
| Resource Allocation and Utilization          |          | <ul style="list-style-type: none"> <li>Item 1</li> <li>Item 2</li> </ul> |
| Capacity and Demand Planning and Forecasting |          |  |
| Time Tracking/Approval Policy and Cadence    |          |  |
| Resource Data Integrity Management           |          |  |
| RM Organizational Change Management          |          |  |
| Resource Management Governance               |          |  |
| Resource Requisition Process - Internal      |          |  |
| Resource Requisition Process - External      |          |  |
| Resource Role Management                     |          |  |
| Resource Skill Management                    |          |  |
| RMO Operating and Support Model              |          |  |

# Crawl-Walk-Run Roadmap

The implementation of an enterprise PPM solution is generally done in waves/phases corresponding to a Crawl-Walk-Run approach.





# Questions?



  
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