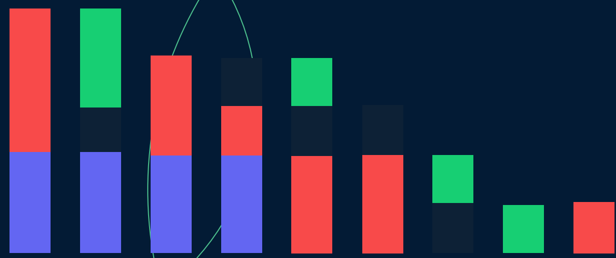


# How to make ressource management a major asset for your business

## The ultimate guide

stafiz

# SUMMARY

# Optimize your employees' workload

## 01. How to manage resources more efficiently?

Good resource planning brings great benefits to your company:

- a more optimized workload and greater productivity
- visibility that enables you to anticipate recruitment needs and sales forecasts
- one of the most effective ways of motivating your staff and involving them in projects that help them grow

Resource scheduling should be considered the engine core, as it is a strategic business process. By working to improve your staffing organization, you lay the foundations for your company's success.

Your process must allow you to identify the most suitable profiles to position on projects using broader criteria: roles, availabilities, as well as employees' expectations. Good staffing must enable the employee to progress: what skills will be acquired on this project? Does this assignment correspond to the employee's expectations?

It may seem complicated at first glance, but with the right tools, it's a very simple approach to implement.

## 02. Who are your employees and what are their expectations?

**You can't know everything: their skill set, what kinds of projects they'd like to work on, which ones they'd rather not.**

- You've got to know them
- You've been working with them for some time
- You've seen them in action
- You know their abilities

Effective staffing management must grant :

- role, availability, skills and personal preferences of the talent
- the possibility for employees to position themselves on projects that may interest them
- help employees grow and meet customer needs

# 03. Resource management indicators that improve performance

A resource scheduling software shows you in real time which projects your resources are allocated to, whether they be customer projects, internal projects, sales activities or training courses.

It enables you to carry out simple searches as soon as a need arises, taking into account useful criteria for both the project and the employee.

This automation provides long-term visibility on :
- employee occupancy over the coming weeks and months
- forecasted employees utilization rates
- projected sales by project and by employee

## Ask yourself

- Are employees under-staffed / over-staffed?
- Which teams lack resources?
- Which profiles should I recruit?

## The goal

- With the right indicators, resource scheduling can answer these questions and improve performance

### The benefits of load visibility

Know in real time what to look for in order to achieve the objectives of the next periods

Ensure that the forecasted workload of employees is properly distributed

Avoid overloading employees or vice versa

Give employees the opportunity to position themselves on a project

Facilitate collaboration and visibility within teams

Position the right profiles in the right place at the right time

### Employee benefits

Visibility of your own and others' staffing

Visibility displayed directly in calendars

Possibility of providing management with information on its own planning

Ability to create profile requirements with the right criteria so that they can be processed by managers

Be able to position yourself proactively on projects

Simplify the updating of what remains to be done in the project

# 04. Analyze the utilization rate

The Utilization rate is the ratio of the time spent on billable projects compared to the available time.

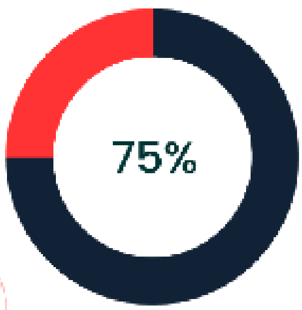
It enables you to check the percentage of time spent on sales-generating projects. Ideally, this utilization rate should be monitored at employee level, but it is also useful to consolidate it at role level (junior, senior, etc...) and at team level, as objectives are often distinct.

Ideally, you should monitor actual utilization rates as well as forecast utilization rates. This will allow you to see:
- the proportion of working time spent on sales-generating projects
- anticipate risks of underloading and possibly accelerate project launch
- understand how internal projects impact workloads

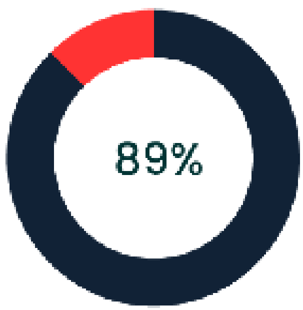
Utilization rates are therefore a key indicator for a service business. Yet, it needs to fit into the employee's profile and reality : not everyone is recquiered to have high utilization rates, especially support and sales profiles.

To reduce these performance bottlenecks, your team members' workload has to be smoothed out. You need to have a consolidated view of the workload, allowing you to see at a glance which profiles are overloaded and which are underloaded, so that you can adjust it more evenly. This smoothing work must be carried out every week to efficiently refine produtiveness on projects, to increase employees' satisfaction and to improve the quality of project delivery.

**Achieved utilization rate**




**Planned utilization rate**




**How to reorganize the workload?**

**In the coming days, weeks and months:**

Who is underloaded?

Who is overloaded?

Who has 100% occupancy but a low utilization rate?

What skills are increasingly in demand?

What is my capacity for these skills?

# 05.

## Smoothing the workload

If you have a solution that grants you the visibility you need to answer these questions in real time, you will save yourself some precious time.

For teams under 10 members, tracking can initially be done using Excel, before moving on to a dedicated tool.

The cultural approach is also important: everyone needs to be aware of the issues linked to employee workloads.

It's important to get the message across and explain how fixed salary costs work in the face of variable sales.
**This will give you an overview of the financial forecast as well.**

Calculate your future sales and margins.
Update your remaining work at the same time as your workload forecast.

# Anticipate your staffing needs from the pre-sale phase

## 01. How to organize the needs to anticipate them?

During the pre-sale phase, the need for profiles to be positioned on your projects will gradually emerge during discussions with the customer. When the sale seems to be confirmed, it's important to take into account the associated workload to gain in anticipation and visibility.

**Get a comprehensive view of the workload: what has already been sold, what is about to be, other internal projects, etc.**

In some cases, several profiles are positioned on the project, but it's up to the customer to choose among them. Ideally, you have information on which profiles have been positioned and their status: presented to the customer, seen by the customer, accepted/rejected by the customer. As soon as the profile is validated, you need to block the associated load to ensure that this profile is pre-booked and will not be presented to another customer.

**Information that is easy to share:**

- Which salesperson is in charge of the opportunity?
- Which profiles are positioned for the opportunity?
- What is the percentage chance of success?
- What are the projected dates?
- What is the projected margin for this project?

**Pre-staff your employees:**

**Every salesperson needs to be able to:**

- assess which opportunities are most likely to lead to a sales closing
- indicate a probability of success to determine the forecast

**With this information, you can :**

- pre-staff employees as soon as you feel an opportunity can be won

**Also staff the pre-sales work:**

To gain visibility over your sales force's workload, you can also assign them direct responsibility for current proposals, or leave it up to them to do so.

# 02.

## What are the benefits of anticipating the workload?

By anticipating your resource planning needs as soon as the opportunity arises, you gain greater organization and better visibility of your employees' workloads.

### Schedule the workload:

When an opportunity is about to be won by your sales team, it's in your interest to pre-staff your employees on this potential project.

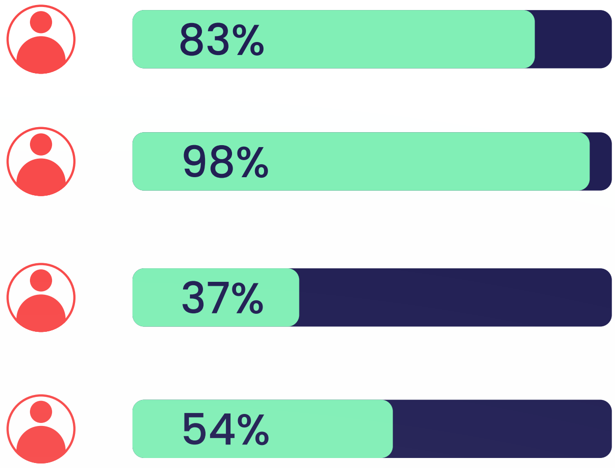
### Example:

If an opportunity has an 80% probability of being won, each employee will see a workload (with a «temporary» status) added to the actual staffing.

### Get your projects up and running faster

Once the opportunity has been won, this pre-staffing must be able to turn into definitive staffing. This saves you time and efficiency at the start of each project, since most of the planning work has already been done. The employee is available to start immediately, which makes organization easier.

If you can, you don't leave this pre-staffing visible to employees, since it's still only temporary and may be subject to change. Only management retains a view of the workload, which consolidates all forecasted time, including pre-sales.




# 03.

## What are the consequences for reporting and decision-making?

Anticipating your staffing needs from the outset gives you a more realistic view of your employees' workload.

### Avoid over-staffing:

A better visibility allows you to :

- even out the workload among your employees
- reduce the workload for those who are over-staffed

This way, you can ensure that employees don't have an excessive workload.

### Anticipate your recruitment needs:

This reorganization should lead you to identify your weaknesses, for example :

- shortage of staff for a given period
- lack of a certain skill at a given time

This allows you to :

- start your recruitment processes on time
- ensure you have the right number of employees to meet your business re-quirements

**This makes you more agile and responsive in your decision-making, which means better management and development of your business.**

# Help employees grow to improve retention

## Skills management and its challenges

Building employee loyalty is a real strategic challenge for companies, particularly in the service sector, where turnover rates are high. Supporting employees in their professional development remains a priority for HR and management, to ensure that employees remain happy and successful.

A prerequisite for managing and developing employees' careers is knowing their skill levels, and being able to track how these skills are evolving. Therefore, it is imperative to establish a skills matrix by role, and to assess each employee to have a starting point.

To create your skills matrix:

- segment roles and grades within the organization
- define the skills and minimum levels of attainment required for these roles
- carry out an employee audit
- assess the skills needed to perform a given role
- identify gaps between current and future roles (possible next career step)
- establish an action plan to enable employees to close gaps

To improve your business, it's imperative to make an analysis of existing skills and compare them with your customers' demand. This will enable you to optimize your business to the full, extend your expertise and maintain commitment.

The management of talents and career tracking is strategic in the sense that it relates to:

- internal mobility
- training
- compensation
- GPEC and external recruitment strategies

## Which actions can you take to help your employees grow?

**01.**

Be able to keep track what the employee has achieved:

- history of missons they worked on

**02.**

There are two possible types of evaluation:

- after each mission/project
- annual or bi-annual

**03.**

Get the right information for each employee:

- their historical utilization rates
- how their time is divided between sales activities, customer projects, internal missions, etc...
- aptitudes

**04.**

Tracking employees' skills:

- Update the acquired skills as new tasks and accomplishments occur
- have up-to-date resumes
- understand the company's needs with a skill-based repository
- identify opportunities for internal mobility
- identify the skills to be developed in order to set up training courses

**To achieve these objectives:**

The history of your employees' past missions enables a better career management by understanding how to help them progress. You need to centralize this information in a single tool to get a better tracking of their evolution.

This will impact employee satisfaction and retention.

## Taking actions:

Implement a skills management strategy in collaboration with all those involved: managers and senior management, HR, and employees.

- Create training courses to meet the need for new skills
- Monitor individual employee progress
- Ongoing monitoring
- Ensure the well-being of employees by taking into account their professional aspirations
- Enable employees to enhance their skills and have opportunities to develop their career paths (development prospects). Concrete, attainable objectives

# Work more easily with free-lancers

## Facilitate the collaborative flow with your subcontractors

## 01. Find the right profiles

Over the course of a project, your employees regularly work with subcontractors. Rather than looking for new subcontractors when the need arises, your organization would benefit from keeping a database of previous subcontractors you worked with, with the history of the projects they have carried out and the evaluation given to them by your employees after their missions. This eliminates the risk of having the wrong profile, and allows you to work with subcontractors who are already familiar with your challenges, methods and culture, for greater efficiency.

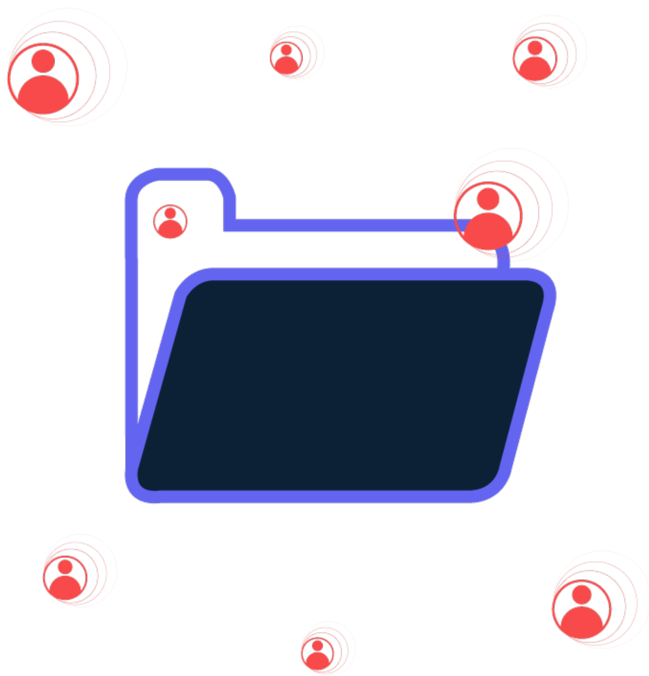
## 02. Why should you create a pool of subcontractors?

When a customer need is confirmed, or staffing is required on a project, it's more efficient to search simultaneously among employees and subcontractors.

**Good to know**

Subcontractor platforms charge you between 15% and 30% commission every time you go through them to take on an extern. The savings from internalizing this process are significant!

Advantage of working with outsourcers: they are paid according to what they deliver. This variable approach is very good for your bottom line.



Working with externals can also bring its lot of administrative work. You need to equip yourself in order to automate this management.

# 03.

## Simplified collaboration with your external contributors

When you work with subcontractors, administrative management is often complicated. A solution that simplifies collaboration should be considered for:

- enable them to submit invoices from their own dedicated environment
- enable them, if necessary, to monitor their activity on the project
- allow them to submit their expenses, with receipts to facilitate your re-invoicing
- enable you to track production, invoicing and payment of subcontractors

# 04.

## Going further with your externals

Some companies work closely with their subcontractors:

- by giving them access to the various projects on which they can proactively position themselves
- by allowing them to update their skills to facilitate your profile searches
- by giving them the possibility to report their periods of absence for leaves or assignments with other customers

This creates a real external community and improves project quality

# Use the right criteria to staff employees

## How can you make staffing smarter?

Identifying the right profile(s) for a project is similar to casting. You have to find the perfect match between the customer's needs and the resources available. Different criteria need to be considered to make the right choice, and to ensure that the selected staffing meets your company's performance objectives.

**Your goals:**

- successful projects
- business profitability
- employee retention
- achieving objectives as a team

## 01. Experience

**What level of experience do employees have for this type of project?**

It is necessary to define the level of experience required for any project, and to ensure that the searching tool can filter profiles based on this criteria.

Experience can be linked to a role or a position, the time spent at said position, as well as the quantity of projects carried out by the talent. Knowledge of a customer's issues is also an interesting trait to look for.
The more familiar an employee is with the customer's problems, the greater the impact that they will have

## 02. Skills and specialties

**?** What skills will be needed for the project? Is it a skill that can be acquired during the course of the project?

To ensure the success of a project, the recquired skills must be clearly defined. You also need to know whether the skill(s) in question must be mastered at the start of the project, or whether they can be acquired during the course of the project.

Some projects allow you to take advantage of the opportunity to upgrade the skills of your employees, without penalizing success from the customer's point of view. Having this information allows you to help your staff grow.

## 03. Availability

**?** Are they already working on a customer assignment? On an internal assignment?

Of course, we need to take into account the availability of profiles over the project period. This availability must take into account the workload forecast for sold projects, in-house projects and projects about to start, and must also take into account employees' absences. Your staffing software must therefore be synchronized with your leave management software.

The profile search must take into account the workload associated with internal projects and those that are still in the pre-sales phase to facilitate arbitration and decision-making.

## 04. Preferences

**The art of staffing is also about positioning profiles according to their preferences: allowing them to choose the type of project that interests them and helps them grow.**

The best way to keep your employees satisfied and engaged is to allow them to indicate their preferences: what types of projects do they want to work on? What skills would they like to develop?

With this kind of information, you can make more informed decisions that are aligned with your employees' goals.

**Going further**

There is no single tool that can take accountability of the total dimension of workloads because it can be subjective: it represents what each person considers to be his or her workload. It is not always about the prescribed and the actual workload - which is performed. Working from home can alter the way workloads are perceived.

-> Talk with your employees to have a more comprehensive picture of their situation.

## 05. Other requirements

### Location

It is important to ensure that your employees are close to your work office, even though nowadays projects can be carried out remotely, especially in the digital sector.

### Subcontractors/candidates

Internal collaborators don't always meet the right criteria, or perhaps the capacity just isn't there to meet the need.
An agile organization needs to see this quickly, in order to find external resources. Ideally, your profile search will draw on your database of internal resources, subcontractors and candidates.

### Absences and part-time work

Other elements to check when staffing are your profiles' leaves and part-times. If, for example, an employee never works on Fridays, this information needs to be recorded in your system in order to take it into account correctly.

### Workload

Good resource scheduling allows you to take a step back from the projected workload, and see at a glance who's over-staffed and who's under-staffed.

Smoothing out the workload means faster progress on projects, avoiding cases of burn-out or boredom, and improving the overall quality of output.

## Would you like to find out how Stafiz can help you improve your efficiency and performance?

You can contact us by email

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