?? Capacity Planner

What Is It?

The Capacity Planner is the application that allows you to keep track of who is working on what and when (past, present, future). This is crucial to understand the workload of you team and take data-driven capacity decisions:

- Hire staff if you are over booked
- Let staff go or reassign if you are under booked
- Advance or postpone the start date of contracts and/or opportunities to adjust the workload

Key Concepts

Capacity

Capacity refers to the amount of work your team can execute at any given time. It is measured in days. Capacity is planned for each team member individually.

Availability

The total amount of days a team member can work in a given month. Someone working full time will have a capacity of ~20 days per month, considering that s/he will not take vacation days and that there are no holidays in that month.

Allocations

The fact of allocating a certain number of working days to a staff member to work on something.

Remaining

The number days that a staff member can still work based on his/her availability and allocations.

$$Remaining = Availability - Allocation$$

- **Remaining > 0** - The staff member can still be allocated work.
- **Remaining = 0** - The staff member is *at capacity,* i.e. you have allocated work to the level of his/her availability.
- **Remaining < 0** - The staff member is over booked, i.e. you have allocated more days that s/he can actually work.

Resourcing Requests

Sending a Resourcing Request is a way of booking a set of human resources for future work. It is a compilation of allocations for a period of time: someone working on something for a certain number of days over a period of time.

In Conduite, Resourcing Requests are sent in 2 instances:

- **During the Business Development phase** when the Sales Team wants to book resources ahead of the signing of contract. They do this directly from the Budget Builder using the Send Resourcing Request Addon feature.
- **During the project execution phase** when Project Managers send their Project Report Out to update the Capacity Manager on how much capacity they need to finish the project.

Key Performance Indicators

The Capacity Manager has a key role in compiling Resourcing Requests in order to provide the following KPIs accurately to other stakeholders in your company.

Utilization

The Utilization is the percentage of time worked (or allocated) over the availability. It tells you how busy your team is overall, regardless of the time of work it is doing.

$$\%Utilization = \frac{allocated}{availability}$$

You want to bring Utilization as close to 100% possible.

Interpretation

- **High Utilization** means that your team is busy and that you actually know what they are working on since you get it from the data in the Capacity Planner.
- **Low Utilization** can mean a few different things:
  - That there's simply not enough work planned for your team.
  - That the Capacity Planner is not updated with the latest Resourcing Requests from the Sales Team or Project Managers.
  - A combination of both.

Billability

The Billability is proportion of available time your team spends on **billable work**. It is a key metric influencing the overall profitability of your organization.

$$\%Billability = \frac{billable}{availability}$$

Billable work is defined as an allocation with the Contract Type tag set to *Client* or *Opportunity* in the Capacity Planner.

You want to bring Billability as close to 100% possible, although it is expected for your team to spend some amount of time on non-billable tasks (admin, internal projects, etc...).

Interpretation

- **High Billability** means that your team is busy working for clients.
- **Low Billability** can mean a few different things:
  - That there's simply not enough billable work planned for your team.
  - You have planned for too much internal work.
  - That the Capacity Planner is not updated with the latest Resourcing Requests from the Sales Team on signed deals or Project Managers.
  - A combination of the above.

Using The Application

> The Availability and Allocations data are processed automatically (equivalent to triggering *Conduite > ⚙ Update Capacity data*) each time the file is opened.

Typical Workflow

Business Development Phase

1. The Sales Team creates a budget for an opportunity using the Budget Builder.
2. It sends the associated Resourcing Request (*# Days / Role / Period* tab) to the Capacity Manager.
3. The Capacity Manager integrates that request into the Capacity Planner.

Project Execution Phase

1. The Project Manager prepares the bi-monthly Project Report Out (PRO) and updates the resourcing forecast for his project.
2. The Project Manager fill and sends the PRO.
3. The Capacity Manager receives the updated project resourcing and updates the Capacity Planner accordingly.

Structure & Features

Settings

This allows you to configure the Capacity Planner.

Column	Description
Allocation Types	Different types work allocation that allow to categorize, at the highest level, what your staff is working on. By default Conduite suggest: • **Client:** A client contract that has been signed (billable). • **Internal:** An internal project or initiative (non billable). • **Opportunity:** An opportunity that is currently in the pipeline (CRM) and for which there is a resourcing request. All allocation types are considered when computing Utilization but only billable allocation count towards your Billability.

Column	Description
Teams	The list of teams that make your organization and that have staff that is allocated to projects. This is useful to breakdown Utilization and Billability by team.
Roles	The list of main roles that are needed on projects. Tip: We don't recommend using the full list of role from your Rates Card but instead focus on the main roles a project needs to be executed (regardless of seniority). Ex: Project Manager, Developer, Designer, Expert.
Probability	The list of possible values for the probability of an allocation. The number of days of an allocation is weighted by its probability. The probability of allocations that are **not** opportunities should be 100%. **Tip:** Carefully choose the lower limit of the range in order not to introduce too much uncertainty in your capacity.

Availability

This tab defines the number of days that a staff member can effectively work per month. This number takes into account the following elements:

- Contractual working time - Someone working full time (100% Full Time Equivalent) will have an availability of maximum ~20 days per month.
- Holidays / Vacations - That number of days is deducted from the contractual working time.

Column	Description
Staff	The name of the staff
Team	The team to which the staff belongs
Comments	Any information allowing to understand the availability of the staff. Ex: mention holidays.
Period	Columns that represent an period of 18 months for which the capacity is planned.

Adding A Staff

In order to add an expense for a role you simply need to:

1. Insert a row where ever you want in the table (*Right Click > Insert row above / below*).
2. Copy the formulas for the computed fields.

Validation conditions will be copied automatically.

Allocation

This allows contain all the work allocations for signed or internal contract / projects as well as opportunities that have a resourcing request and that have a high enough probability. There is one work allocation per person per contract / project.

Column	**Description**
Allocation Type	The type of allocation
Contract / Project	The name of the contract / project. **Tip:** Use a standard naming convention. For ex: *<client name>* | *<project name>*.
Probability	The probability of the contract / project. The probability should be 100% for anything that is **not** an opportunity.
Staff	The name of the staff member.
Team	The team of the staff member *Computed Field*
Role	The role of the staff member of the project.
Period	The number of days allocated for a staff member per month (over 18 months). The column in yellow corresponds to the column of the current month.

Adding An Allocation

In order to add an allocation:

1. Insert a row where ever you want in the table (*Right Click > Insert row above / below*).
2. Copy the formulas for the computed fields.

Validation conditions will be copied automatically.

Remaining

This is **not** a read-only tab. Do not modify the configuration of the pivot table.

Make sure that the table is up-to-date with the latest data from the Availability and Allocations tab: ◫ *Conduite > ⚙ Update Capacity data.*

This tab shows you a table summarizing the number of days remaining for each staff member per month. Here you can easily identify who is under or over booked.

If you click on the plus sign next to a staff member's name you can expand the row and see the detail of all allocations. Allocations appear as negative numbers.

The default cell coloring helps get a quick overview of the situation:

Cell Color	Range
Green	Remaining days between 0 and 3. The staff member has some open capacity.
Yellow	Remaining days between 4 and 6. The staff member has open capacity.
Red	Remaining days 7 or more. The staff member has a lot of open capacity.
Grey	Remaining days < 0. The staff member is over booked.

Utilization

This is a read-only (protected) tab. Do not modify it.

Make sure that the table is up-to-date with the latest data from the Availability and Allocations tab: ◫ *Conduite > ⚙ Update Capacity data.*

This tab shows the utilization data.

Table	Chart
The table displays the % Utilization and the number of remaining days for each team	The chart displays the overall % Utilization (line) and the number of remain days (columns).

Billability

> This is a read-only (protected) tab. Do not modify it.

> Make sure that the table is up-to-date with the latest data from the Availability and Allocations tab: 🇫🇷 *Conduite > ⚙ Update Capacity data.*

This tab shows the billability data.

Table	Chart
The table displays the % Billability for each team	The chart displays the team specific % Billability (lines) and the overall billability (columns).

Normalized Data

> This is a hidden and read-only (protected tab). This tab should remain hidden. Do not modify it.

This tab contains the data used to create the pivot tables and charts in the Remaining, Utilization and Billability tabs. It combines the data from the Availability and Allocations tabs.

Column	Description
Allocation Type	Same as in the Allocation Tab // "_availability" if Availability
Projet	Same as in the Allocation Tab // "_availability" if Availability
Probability	Same as in the Allocation Tab // 1 if availability
Staff	Same as in the Allocation Tab
Team	Same as in the Allocation Tab
Role	Same as in the Allocation Tab
Period	Same as in the Allocation Tab
Allocation	-(Allocation x Probability) // 0 if Availability
Availability	Same as in the Availability // 0 if Allocation

Configuration

> This is a hidden and read-only (protected tab). This tab should remain hidden. Do not modify it.

This tab contains the ID of the Conduite configuration file and other computed configuration parameters.

Updating The Capacity Planner

Updating Availability

The availability data should be updated each time something affects the effective number of days that staff member can work on a given month. For example:

- The month includes holiday. Ex: May 1st.
- The staff member takes vacations days.
- The member reduces his/her contractual working time. Ex: from 100 FTE to 50%.

If a staff member leaves your organization, put his/her availability to zero for the rest of the period range. Do not delete him/her until there are allocations associated to him/her.

Changing The Period Range

Capacity planning is done on the basis of a rolling period range. Conduite offers up to 18 months of visibility. You will regularly need to push the period forward to plan the capacity of your team in the future. This can be done automatically using the menu item *□□ Conduite > □□ Update Period Range*.

Adding / Removing Teams

You can add and remote teams in the Settings tab. Be aware that doing so will break the Utilization and Billability charts since the pivot table they rely on will also change. You simply need to update the Data Range of the charts to fix the issue.

Conduite Menu

Update Capacity Data

The Remaining, Utilization and Billability tabs are based on the combined processing of the data of the Availability and Allocations tabs. This menu triggers the data processing.

Make sure to trigger this menu item if you want to look at the Remaining, Utilization and Billability tabs after the Availability or Allocations tabs have been updated.

This menu item is triggered automatically each time the file is opened.

Update Period Range

This menu allows you to easily modify the period range.

In order to do so:

1. Go to the Allocation tab.
2. Select the cell corresponding to the month that should be the new lower period range.
3. Click the menu *Conduite > Update Period Range*.

This will do the following:

1. Move allocation data (Allocation tab).
2. Move the availability data (Availability tab)
3. Update the period range (first row of both tabs)

> You can always revert these changes by using the undo feature of Google Sheets.

Example

See the following Allocation tab. The current period ranges from June to November. The current month is August

Staff	2023-06	2023-07	2023-08	2023-09	2023-10	2023-11
Diego	10	10	8	8	2	2
Leo	5	5	10	10	15	15

You want move the period forward so that it starts in August. You select the cell `2023-08` and you click the *Update Period Range* menu. The resulting Allocation will be as follows.

Staff	2023-08	2023-09	2023-10	2023-11	2023-12	2024-01
Diego	8	8	2	2		
Leo	10	10	15	15		

Help

This menu item opens the sidebar and loads this help page.

Revision #14
Created 2023-03-01 20:56:34 UTC by guillaume
Updated 2023-09-19 22:02:41 UTC by guillaume