

WICRESOFT

Digital Productivity Solutions Built
for the Microsoft Cloud

Reimagine Business Productivity



Enterprise Resource Capacity Planning in an Adaptive Project Management World

 OnePlan

Topics

- Resource Management Concepts
- Resource Management Best Practices
- Resource Management Reports and BI
- Collaboration for Winning Teams
- Demonstration
- Summary & Next Steps

What is Resource Management?

Resource management is the efficient and effective deployment and allocation of an organization's resources when and where they are needed.

Benefits:

- Resource Visibility
- Increase Business Value
- Save Time and Money
- Increase Project Success Rate
- Accommodate Demand
- Employee Satisfaction



Resource Management Challenges

1 | Resource Ownership

2 | Resource Focus

3 | Non-Project Workload

4 | Resource Tracking

5 | Resource Visibility

6 | Manual Reporting

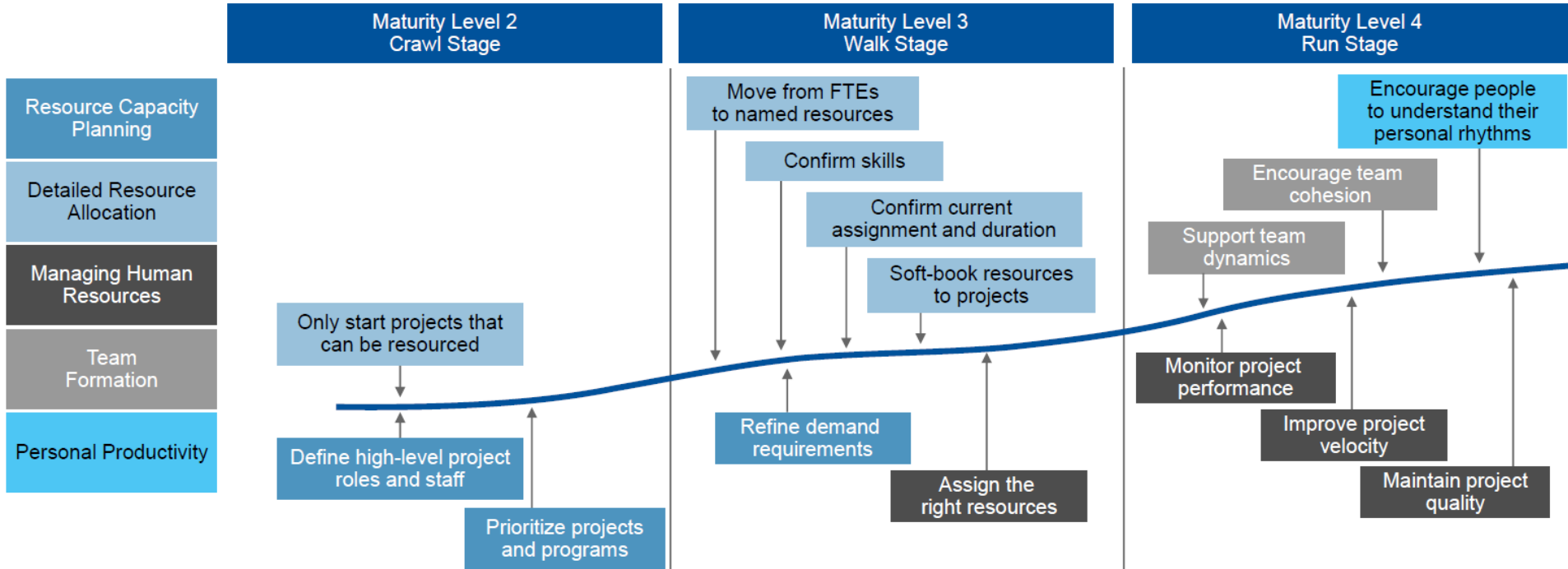
7 | Too Much Information



5 Resource Management Steps



Resource Management Maturity Model



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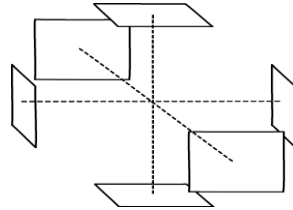
Resource Management Maturity Dimensions

Planning / Tracking
Granularity

Roles / Resources

Resource Costs

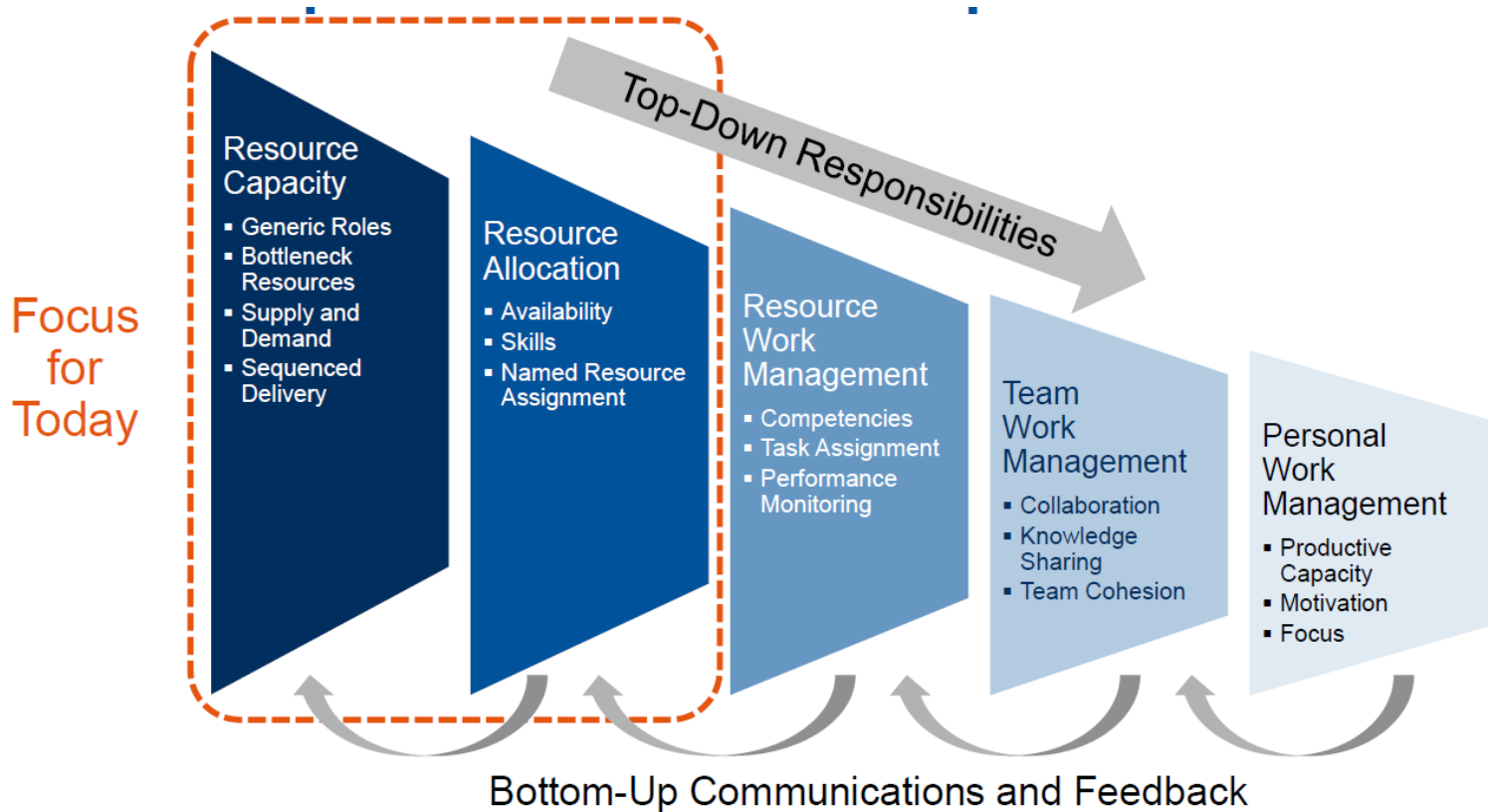
Approval / Negotiation



Governance / Prioritization

Forecasting vs. Actuals

Balance Top-Down and Bottom Up

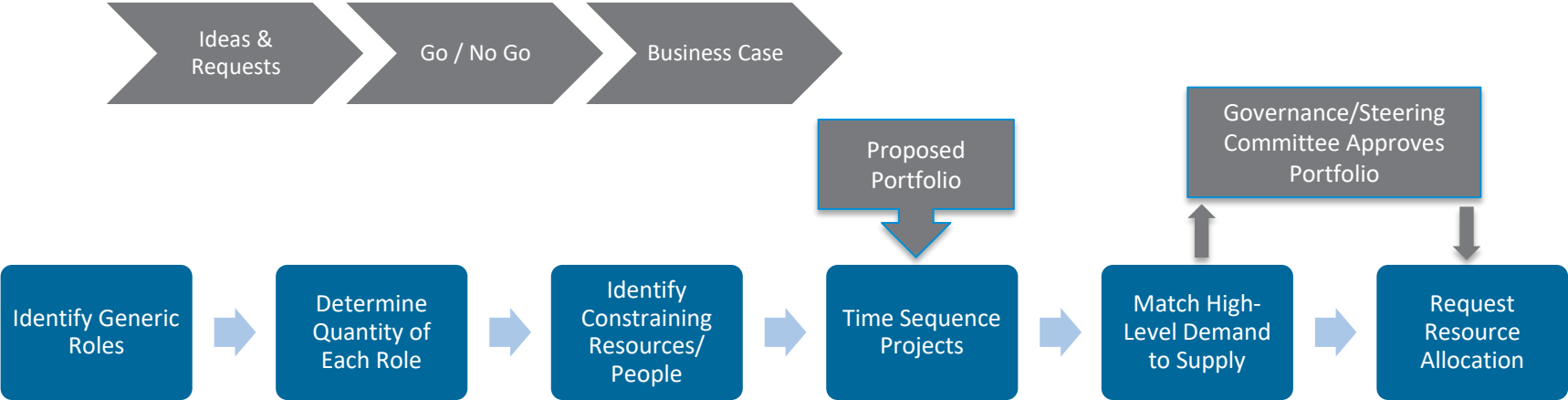


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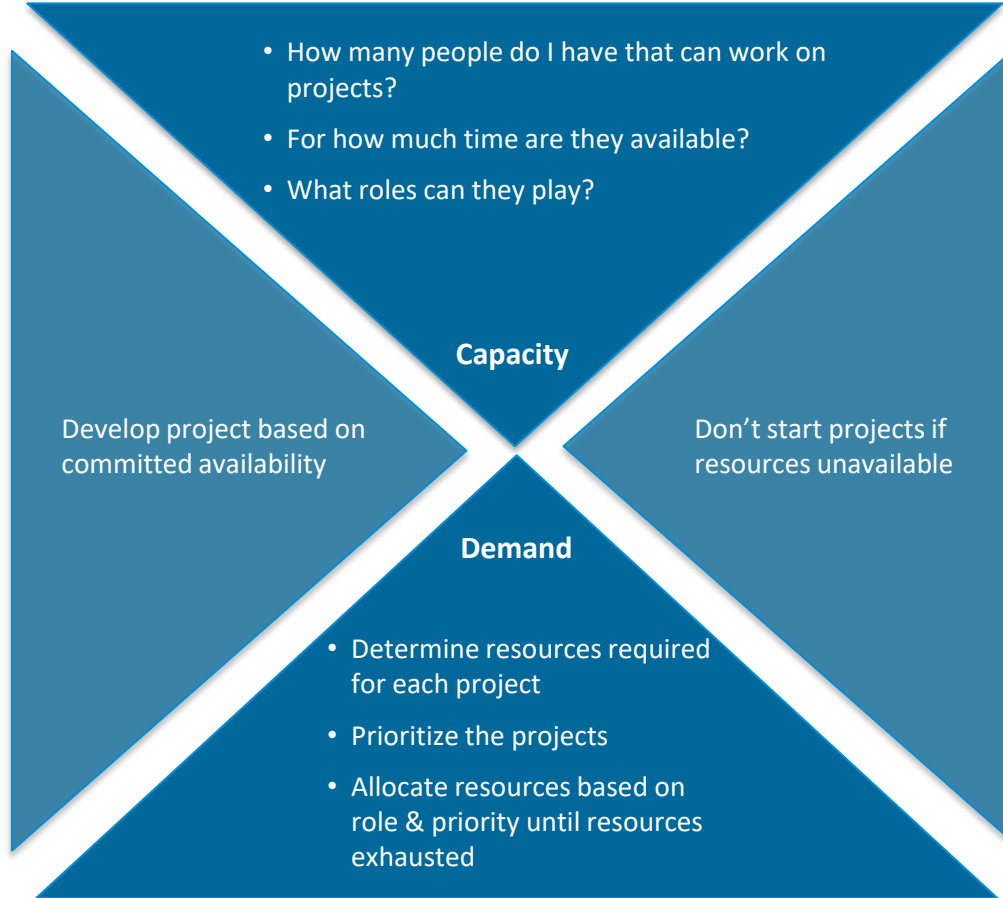
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Use of Roles

in Demand and Portfolio Management



Understanding Resource Capacity



Resource Management Next Steps

1. Assess readiness
2. Understand your resource management maturity
3. Understand the environment
4. Build a resource management roadmap
5. Develop practical action plan to get to the next maturity level
6. Define your process first, and then automate



How organization manage
resources today



The problems with Excel

1. Lack of standards (very individual)
2. Manual and static model
3. Easy to break formulas and calculations
4. No dynamic visibility of resource capacity
5. Time consuming when things change
6. Disconnected from project management info
7. Visibility & insight for overall reporting
8. Governance
9. Strategic alignment of projects to company objectives



Transformative options



Transformative options

1. Embedded processes
2. Central data store
3. Actionable intelligence



ONEPLAN PROVIDES A PR...



Connecting Strategy to Execution

OnePlan offers a strategic portfolio, financial and resource management solution that fits the needs of every PMO. Optimize your portfolio, financials and resources enterprise wide. Connect OnePlan with Microsoft Project, Office 365 Planner, Azure DevOps, Jira, and more for a complete view into all work across the enterprise.

A collage of six OnePlan dashboard screenshots. The top row includes "Resource Plan" (a Gantt chart with resource bars), "Portfolio Plan" (a high-level portfolio overview with financial metrics), and "Financial Plan" (a detailed financial waterfall chart). The bottom row includes "Work Plan" (a task list with status indicators), "Agile Plan" (a Kanban-style board with task cards), and "Status Reporting" (a summary dashboard with various charts and data points). Each screenshot shows the OnePlan interface with various data visualizations and navigation elements.

Resource Plan

Portfolio Plan

Financial Plan

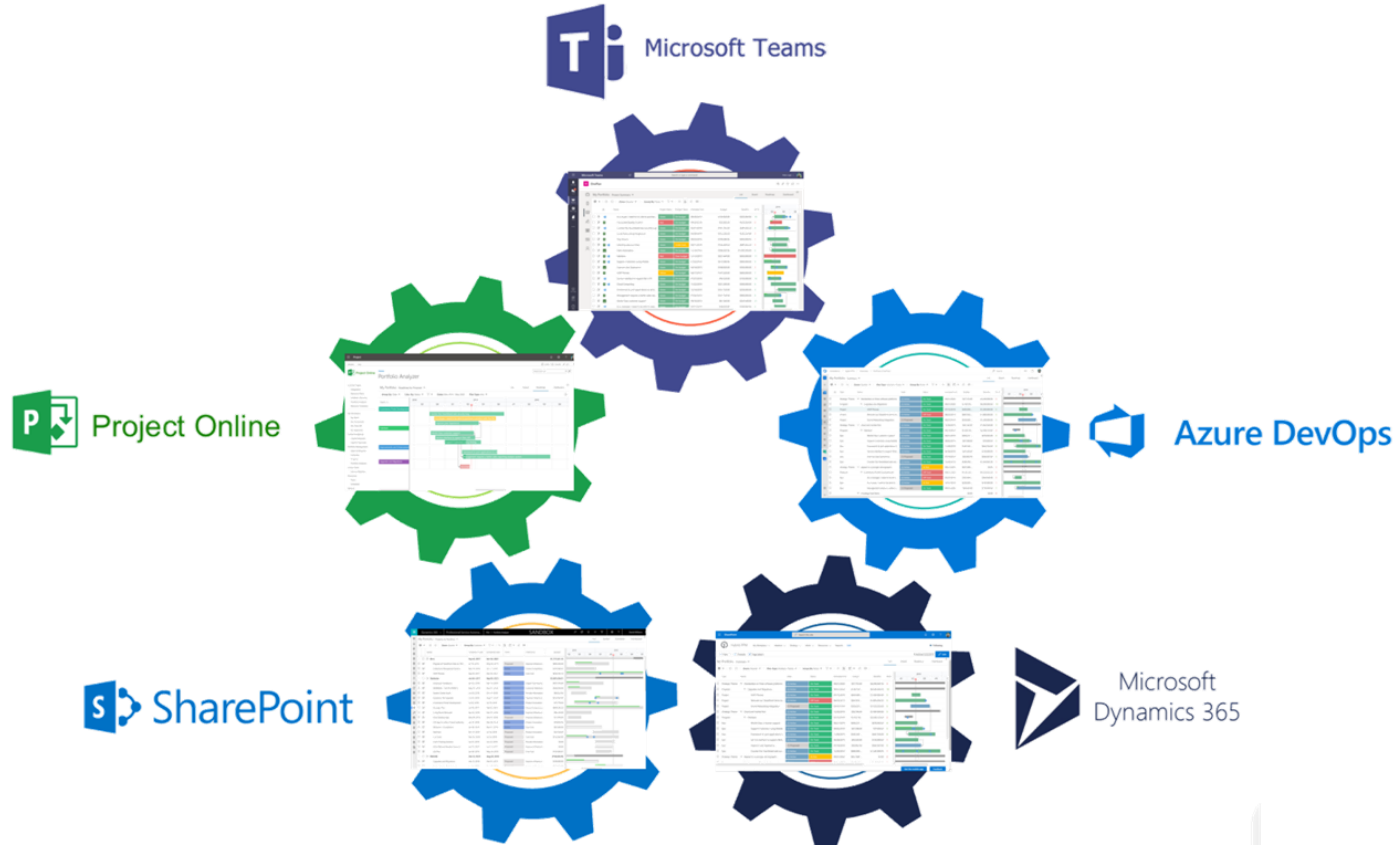
Work Plan

Agile Plan

Status Reporting

Empower Teams with a Fused Microsoft User Experience

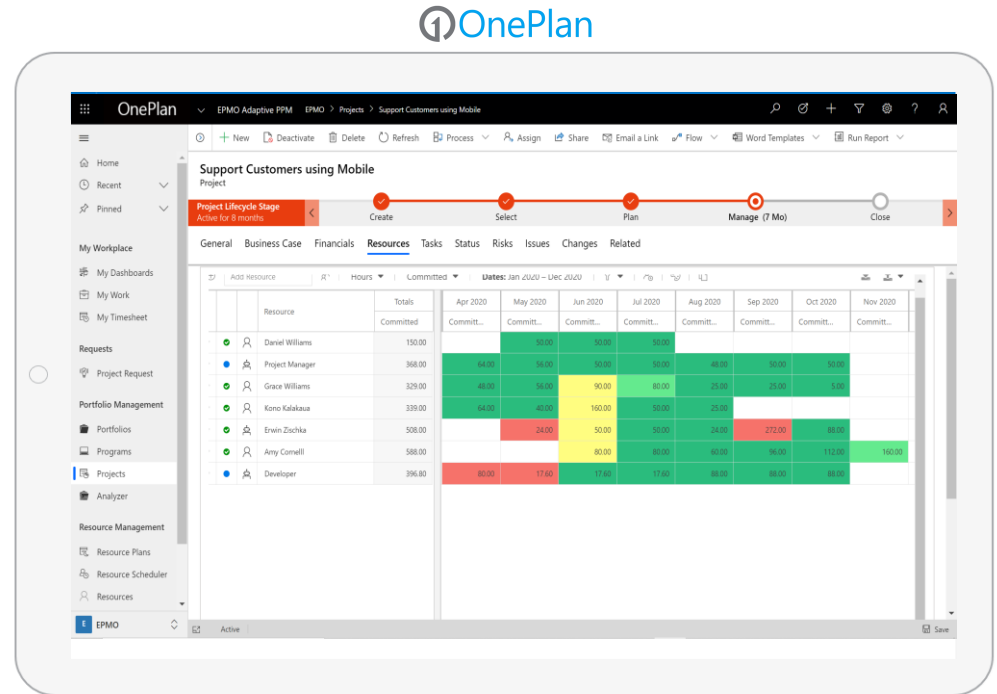
OnePlan is built on the Microsoft **Office 365** and **Power Platform**



Visual Resource Capacity Planning Within Projects

Resource planning for individual projects based on organization-wide capacity and demand

- Detail time-phased resource estimates
- From idea to execution
- FTE, percentage and hours
- Look at existing demand and commitments as you are planning

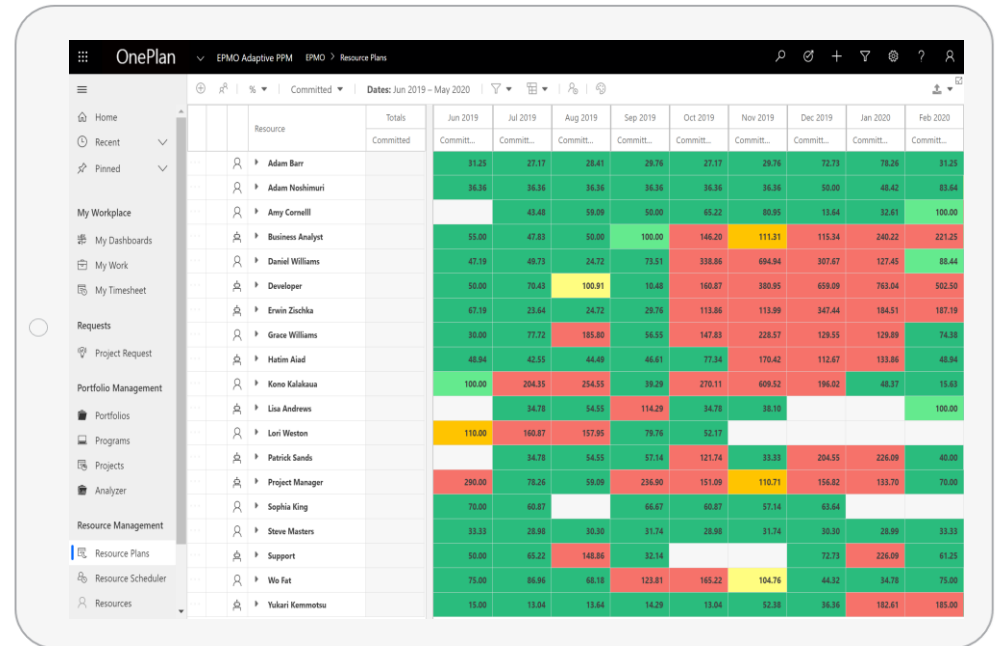


Resource Capacity Planning Organization-Wide



Resource planning and visibility across the enterprise

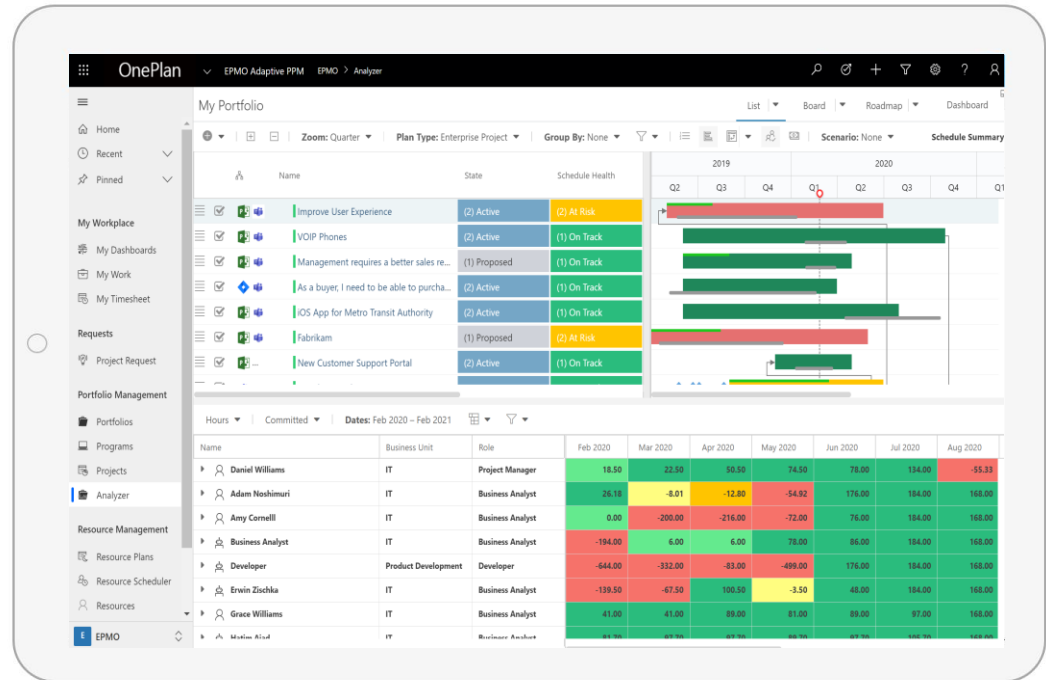
- High-level capacity and demand with a fast and visual user experience
- Look at resources proposed and committed across all project and work efforts
- Easily substitute and balance resourcing with drag-and-drop re-assignment, or simple replacement
- Match individual resources to the project's requirements by finding team members according to their roles, skills, and availability.



Leverage for Strategic Portfolio Analysis

Drive business value with robust portfolio analysis

Easily model different portfolio scenarios to determine the best strategic path. Weigh project proposals against strategic business drivers and objective scoring criteria, all while considering cost and resource constraints



Financial Planning

Labor Costs Based on Resource Capacity Planning

- Flexible cost types and categories
- From original estimates to budgets, revised forecasts, and actuals tracking
- Time-phased costing
- Part of the original business case and ongoing project execution



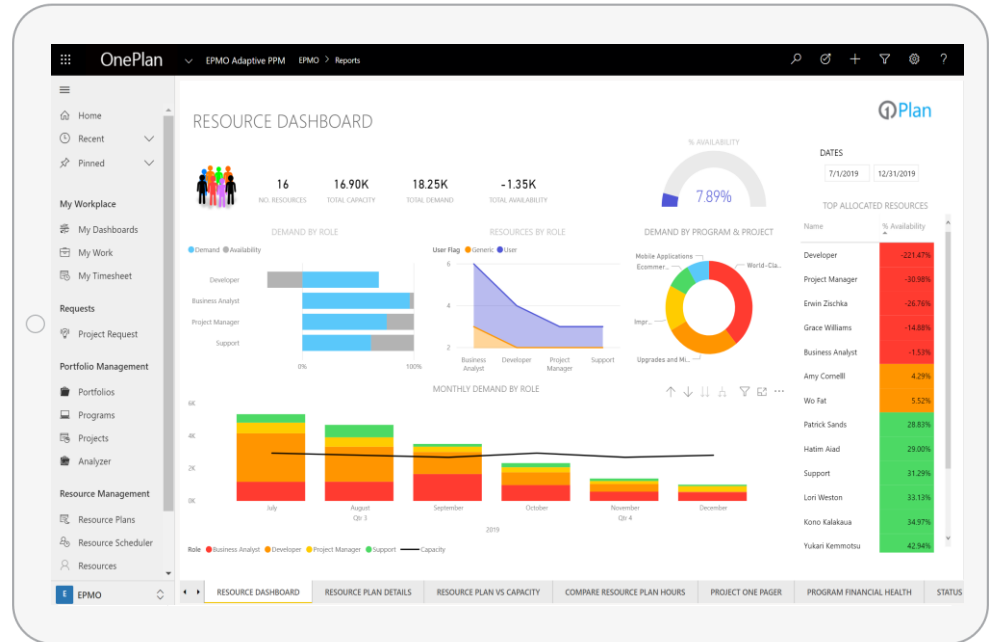
The screenshot displays the OnePlan software interface for a project named "Support Customers using Mobile". The interface includes a navigation sidebar on the left with options like Home, Recent, Pinned, My Workplace, Requests, Portfolio Management, Resource Management, and Resources. The main content area shows a project lifecycle stage "Active for 7 months" with a progress bar and tabs for "General", "Business Case", "Financials", "Resources", "Tasks", "Status", "Risks", "Issues", "Changes", and "Related". The "Financials" tab is active, showing a budget and actuals table for the project. The table includes columns for "Cost Category", "Expense Type", "Budget", "Actuals", and a comparison of "Budget" vs "Actuals" for each month from Jan 2020 to Mar 2020. The "Plan Total" row shows a budget of 493,980.00 and actuals of 96,000.00. The "Labor" row shows a budget of 328,480.00 and actuals of 96,000.00. The "Business Analyst" row shows a budget of 163,000.00 and actuals of 40,000.00. The "Developer" row shows a budget of 126,000.00 and actuals of 20,000.00. The "Project Manager" row shows a budget of 39,480.00 and actuals of 36,000.00. The "Support" row shows a budget of 0.00 and actuals of 0.00. The "Materials and Supplies" row shows a budget of 0.00 and actuals of 0.00. The "Travel and Expenses" row shows a budget of 40,500.00 and actuals of 0.00. The "Contracts" row shows a budget of 25,000.00 and actuals of 0.00. The "Software" row shows a budget of 75,000.00 and actuals of 0.00. The "Other" row shows a budget of 25,000.00 and actuals of 0.00. The table also includes a "Compare To: Budget < Actuals" and "Variance: None" dropdown menu.

Cost Category	Expense Type	Totals		Jan 2020		Feb 2020		Mar 2020		Budg
		Budget	Actuals	Budget	Actuals	Budget	Actuals	Budget	Actuals	
Plan Total		493,980.00	96,000.00	2,500.00		23,340.00	31,000.00	47,300.00	65,000.00	76.3
Labor		328,480.00	96,000.00			15,840.00	31,000.00	34,800.00	65,000.00	64.8
Business Analyst	CapEx	163,000.00	40,000.00				15,600.00		25,600.00	
Developer	OpEx	126,000.00	20,000.00					19,800.00	20,000.00	64.1
Project Manager	OpEx	39,480.00	36,000.00			15,840.00	16,000.00	15,000.00	20,000.00	
Support	OpEx	0.00	0.00							
Materials and Supplies	CapEx	0.00	0.00							
Travel and Expenses	OpEx	40,500.00	0.00			5,000.00		7,500.00		1.1
Contracts	CapEx	25,000.00	0.00							
Software	CapEx	75,000.00	0.00							5.1
Other	CapEx	25,000.00	0.00	2,500.00		2,500.00		5,000.00		5.1

Dynamic Resource Reporting and Analytics

Deliver new insights into your business with visual reporting & analytics.

Make the right decisions with access to reporting and analytics. Visually monitor utilization of your team to help with capacity planning. Slice and dice the data to personalize your view. Monitor and improve your team's efficiency and compliance.





Enterprise Resource Capacity Planning

Reimagine Productivity

DEMONSTRATION



Enterprise Resource Capacity Planning

Reimagine Productivity

SUMMARY & WRAP-UP

Summary

Resource management is a critical success factor for PPM success

Approach and processes should align with organizational readiness and maturity

High-level capacity planning is a good place to start

More detailed resource allocation can follow as ready or needed

OnePlan provides a great platform for all PPM capabilities

OnePlan also extends existing solutions to provide enhanced visual planning and capabilities

OnePlan also enhances all aspects of top-down, strategic planning and analysis

OnePlan is fully integrated and embedded in the Microsoft Cloud

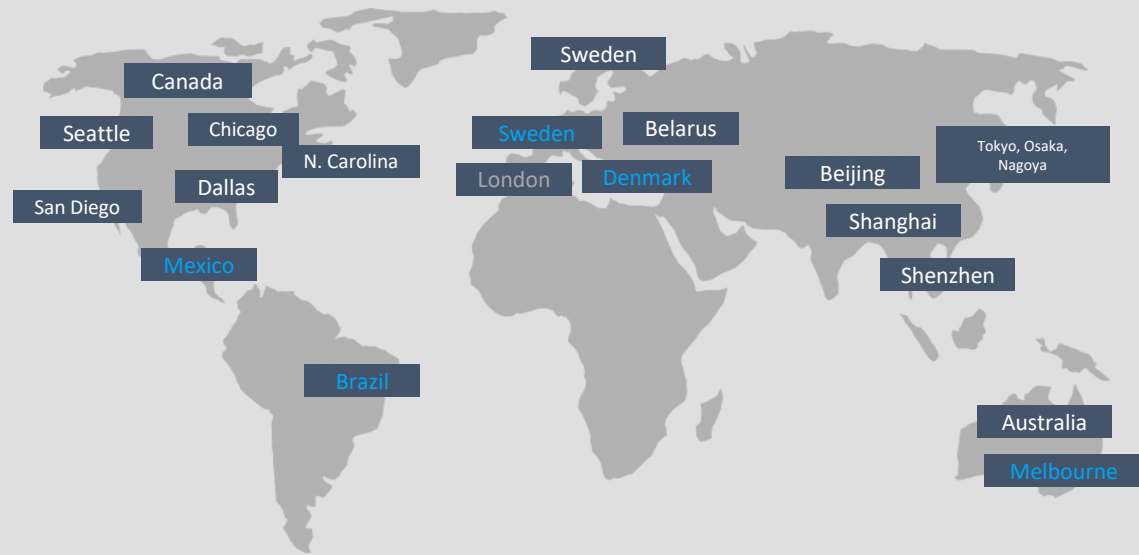


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Joint-Venture with
Microsoft in 2002

6,500+ Global Employees

Microsoft 2019 Worldwide
Partner of the Year



Project & Portfolio
Management



Collaboration &
Content



Cloud Productivity



Cloud Platform



Data Analytics

Winner
Microsoft Partner
2019 Partner of the Year
Project and Portfolio Management
Award



PPM Technical Consulting & Advisory Services



ONE-STOP-SHOP FOR PROJECT PORTFOLIO MANAGEMENT TRANSFORMATION

Your dedicated partner in maximizing work productivity and creating the shortest path to value

IMPLEMENTATION SERVICES



Dedicated to creating the shortest path to value
KickStart Package

Select Package

Cloud Migration

Consulting Services

EDUCATION AND TRAINING



Training how you want it, when you need it

Online University

Role-based Learning Paths

On-demand Webinars

Instructor Led Courses

CUSTOMER SUCCESS AND SUPPORT



Peace of mind with 24/7 customer support

Access to Experts

Self-Service Portal

Community

Knowledge Library

ADVISORY SERVICES



Drive and support continuous improvement

PMO Staffing

Advisory Consulting

PMO Standup

PMO as a Service

Special Offer – Free PPM Roadmap Workshop

- Review your current use of PPM Tools
- Assess current requirements and desired future state
- Determine how to implement or migrate into a new Adaptive PPM solution
- Implementation roadmap for best adoption success
- Total cost of ownership evaluation



WICRESOFT
Advisory | Solutions | Operations ●●●

 **OnePlan**


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Adaptive Project Portfolio Management

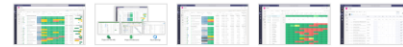
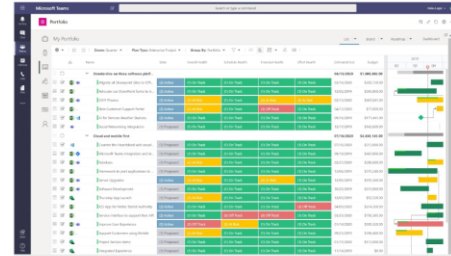
OnePlan offers a portfolio and resource management solution that fits the needs of every work team including product teams, PMOs and even service organizations. With OnePlan you can optimize your portfolio and resources enterprise wide. Integrate OnePlan with Microsoft Project, Microsoft for the web, Office 365 Planner, Azure DevOps, Jira, and others for a complete view into all work in one portfolio.

Key Features

Ideation and Project Intake
Don't miss out on the next big idea. Innovation can come from anywhere. To foster innovation teams must be able to collect, vote and prioritize every new idea. In many cases, it's consolidation of multiple ideas that generates winning products. Engage your teams and empower out of the box thinking to drive innovation across the Enterprise.

Strategic Portfolio Planning
In order to accurately forecast your portfolio, you have to consider all work across the organization and it's alignment to strategic objectives. Prioritize the right work and ensure you have the resources and funding you need to execute on your strategy. If your demand outweighs your capacity, you'll have the tools you need to make the best decisions for the business.

Financial Planning
Estimate, track, and forecast your spend throughout your work's lifecycle regardless of work type. Ensure your products are profitable and your PMO is preventing cost overruns. Track various cost types and categories for the flexibility you need to manage budgets and spend across teams, departments and BUS.



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Next Steps



- **FREE – PPM Roadmap**
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