

# Eliminate the whiteboard and the dartboard: keys to optimizing the resource management process

This white paper discusses the significant financial and efficiency benefits that professional services companies realize through an optimized resource management process complemented by a Professional Services Automation (PSA) solution.

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### Overview

Organizations that use the “whiteboard” and “dartboard” approach to resource management are, in effect, playing a game of chance. What if the whiteboard is “erased” or the dart hits the wrong resource? Mission critical staffing decisions should be made with accurate, up-to-date resource utilization and skills data that can only be provided through the marriage of a Professional Services Automation (PSA) solution and sound resource management practices.

### Resource management

While it is fashionable for firms to refer to themselves as “people” businesses, the professional services business truly is one. When your revenue stream derives from selling your team’s talent, rather than a car or computer, you have to meticulously manage your resources much like Dell manages computer components. Unfortunately, many professional services firms manage their staff using “whiteboards” and “dartboards”. The whiteboards are used to determine who is available to be staffed to which projects, while the dartboards are used to pick among the available resources. While the dartboard may be efficient, it is not effective; and while the whiteboard can be effective (with some hard work and data management), it clearly is not efficient.

These issues inherent in the dartboard and whiteboard approach become even more evident as a firm grows. While you might be able to manage the challenges of a staffing process for a ten person organization, it becomes unwieldy when your organization doubles or triples. Your legacy methods for managing resources will need to change, or you risk losing significant revenue opportunities due to a lack of insight into your most important assets—your people.

### Eliminate the whiteboard

Practically everyone in the services world will admit to knowing this whiteboard all too well. It likely has resources listed in a column and the projects to which they are staffed across each row. Perhaps this whiteboard is in your office with green marker used to indicate that someone is available and red to indicate that a resource is not available. Or, perhaps the whiteboard exists in a spreadsheet that is shared daily/weekly with your team or saved on a shared drive. Either way, maintaining the accuracy of the data is next to impossible. Why? There are many reasons, but the most commonly cited include the frequency with which resources change projects, the frequency of project scope and schedules changes and your own project managers’ frequent demands for specific resources to be staffed to their projects. Furthermore, if your resources are working on more than one project at a time, the whiteboard loses its visual simplicity.

The only way to eliminate the whiteboard is to invest in a Professional Services Automation (PSA) solution. With a PSA solution, your staffing team and project managers will have access to the same real-time data on resource availability, so everyone will know who is available and who is not. As staffing allocations are changed, your PSA solution will automatically reflect these changes. These reports, incorporating all changes, can be shared with select people or emailed so everyone is working with real-time, up-to-date data. Ultimately, you will gain tremendous efficiencies from a PSA solution, saving you and your company both time and money.

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Furthermore, an accurate staffing plan is a key input to forecasting demand planning and hiring needs. If the staffing plan is written on your whiteboard in your office, without significant data entry, you will not be able to use this data as an input into other aspects of your business. Conversely, by using a PSA solution, you can use your resource/staffing plans to drive financial forecasting as well as determine your hiring gaps by role/level/office for the coming months. In the end, if your plan is not accurate-practically an impossibility when using the traditional “whiteboard” approach- then the financial forecast and demand plan cannot be accurate either.

**Best practices demonstrated by OpenAir clients:**

- Allocate resources to projects as far out as you can without losing accuracy. Forward-looking staffing data feeds into financial forecasts and demand-planning reports, so while inputting data for future months will help forecasting, inaccurate data will make the forecasts worthless.
- Update staffing plans weekly or semi-monthly, but create new bookings/allocations as necessary. Updating staffing plans daily provides limited upside but places a significant burden on your company.

**By eliminating the whiteboard, your company will realize the following benefits:**

- Increased resource utilization and profitability by keeping the right resources on the right projects and avoiding gaps in staffing.
- More accurate financial forecasting, resulting in better insight into key operating metrics for your firm.
- More accurate demand planning forecasts, allowing you to alter hiring plans, as needed.

**Eliminate the dartboard**

We all know the dartboard. Perhaps you have an effective method to determine the availability of your resources, but how do you determine who ultimately is staffed to a project? You may employ the “dartboard” method of staffing, which involves significant guesswork and random choices, and in the worst case scenario, throwing a “dart” at a set of resources and staffing the person on which the “dart” lands.

**The ideal staffing decisions consider the interests of your clients, project managers and resources:**

- Clients want people working on their projects who understand their business and their industry. Resources with experience working on other cases for that client or similar companies are highly valued.
- Project managers want only exceptional people staffed to their projects, but also value people with specific technical or language skills, for instance. Similar to your clients, they also value resources who have worked for this specific client or other companies in the industry.
- Resource interests are often overlooked in the staffing process. Perhaps resources want to work for clients in specific industries or verticals, or are looking to travel more for their work?

Capturing the data to please all three constituents is next to impossible. You might be able to maintain a spreadsheet that captures the relevant skills of your resources, as well as education level achieved, but what about previous work experience or your resources’ own professional goals and interests. As employees are added and skills change, maintaining this information in a repository that is shared with the appropriate people is impossible.

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By using a PSA solution, you can automate this process and eliminate the “dartboard”, allowing you and your teams to make better staffing decision. Employees’ backgrounds, skills, interests and resumes can be stored in OpenAir for easy reporting and searching. Project managers then can search for resources to allocate to a project based on a specific profile, such as industry experience, skill set and interests, allowing you to make educated staffing decisions.

**Best practices demonstrated by OpenAir clients:**

- Only track what truly matters to staffing decisions. For example, if every resource has a particular skill, it may not make sense to track it. Maintaining the “skills database” can be cumbersome if you are using many categories that are irrelevant. OpenAir has found that most clients only need five to eight categories to successfully manage resource skills and experience.
- Update resource’s skills every six months coinciding with professional development and year-end reviews. Updating more frequently provides little benefit, while updating less frequently ensures that the data is outdated and will not be trusted by your team.
- For companies using contractors, store key contractor data in your skills database, including contact information and reviews from past work.

**By eliminating the dartboard, your company will realize the following benefits:**

- Higher employee satisfaction and improved employee retention by allowing employees to communicate preferences on work type, location, and goals.
- Enhanced client satisfaction by ensuring the most qualified teams are staffed on each project.

### PSA is not enough

While a robust PSA solution such as OpenAir will help you to automate your staffing and resource management process, without a thoughtful process and approach to resource management, your organization will fail to achieve all of the benefits of adopting a PSA tool.

**So what is the right resource management process? Finding the right resource management process for your company requires addressing many questions, including:**

- Should all staffing be centralized with one person? Or, should the staffing decisions be delegated to a team?
- Should project managers have dedicated resources, thereby eliminating the need to request for resources?
- Who is involved in the resource staffing process?
- Who has executive authority to schedule resources to work on projects?

**Best practices demonstrated by OpenAir clients:**

- Institute the right levels of approvals for your company. An approval workflow for staffing decisions may be burdensome to some companies, so carefully consider your company size, culture and current staffing process before implementing a PSA solution.

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- As your company grows, delegate staffing decisions by department or level. It is impossible for one person to maintain an accurate view of utilization across companies with more than 100 resources. A PSA solution can help you to delegate the staffing decision authority while still following a controlled process.
- For companies that require an implicit staffing approval process, consider having project managers request generic resources. In this instance, project managers request levels or roles of people to be staffed, thereby eliminating their tendency to request their favorite resources and allowing the resource/staffing manager to determine the best resources for each request.

Whatever staffing/resource process your company uses, it is a critical input to the management of your business. When coupled with a robust PSA solution, your company will experience tremendous benefits, including higher customer satisfaction, improved employee retention, and increase revenues and profits by eliminating gaps in staffing.

### Conclusion

The most effective staffing decisions, and thus the most successful projects, are those that take into account the interests of all involved. The traditional “whiteboard” and “dartboard” resource management methods simply do not provide the level of insight and visibility necessary to ensure that the right resources are working on the right projects for the right clients. By defining the best resource management process for your organization, and putting it into action through a robust PSA tool, you can eliminate the whiteboard and dartboard and put your organization on the road to successful resource management.

### About OpenAir

OpenAir, Inc., a NetSuite Inc. Company, is a leading provider of Software as a Service (SaaS) services automation software. OpenAir’s Professional Services Automation (PSA) solution gives project-based organizations and firms the tools they need to grow their businesses quickly and profitably. Providing enterprise-level functionality for businesses of all sizes, OpenAir has more than 42,000 active users at over 300 world-class firms who use the software to better capture billable time, manage projects and resources, and bill customers. Coupled with a team of highly experienced consultants from some of the world’s leading services firms, OpenAir PSA drives higher profits through improved utilization, visibility and data collection. To learn more, please visit [www.openair.com](http://www.openair.com).

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