# PURPOSE

- Why: The improvement is needed because resource planning can be more accurate when it is possible to compare actual results to planned values in the resource plans.

  - Prioritizes work and prevents employees from becoming overloaded or underutilized.
  - Customer satisfaction improves when teams can fulfill service requests and projects on time and as expected.
  - Improve the effectiveness and efficiency of service delivery to the end customer.
  - Enables planning for future projects, ensuring that there are enough people in place to achieve goals.

- Intended Outcomes:

  - Better effectiveness in scheduling work and balancing out employees' workloads.
  - Better management by understanding how employees spend their time.

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# PEOPLE INVOLVED

- Project Sponsors:
  - Brice Bible
  - Elizabeth Shirkey

- Project Team Members:
  - Joyce Shealy
  - Leslie Peters
  - Brennen Gerards

- Subject Matter Experts:
  - Laurel Eddins
  - Chris Knox

- End Users:
  - Division of IT Resource Managers
  - Division of IT Staff

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# PROJECT PATH

- Resource Optimization Project Charter

- Phase 1 Discovery – Deep Understanding
  - Review of current state
  - Input from customers and stakeholders – DoIT All Staff Survey
  - Gained insights

- Phase 2 Possibility – Action Set
  - Design future state with customer input and intended goals as key drivers
  - Streamline and simplify
  - Checkpoint with sponsor – review current state and proposed future state

- Phase 3 Planning – Implementation Plan
  - Convert action items into an implementation plan

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# KEY IMPROVEMENTS

1. Eliminate "requirement" of an Operational ADMIN Resource Plan that doesn't add value.
   - Still reserve 20% of time for Administrative activities.
   - Total Operational KTLO and Project Resource Plans forecast totals will be 80% instead of 100%.

2. Simplify forms so they're done right the first time.
   - Simplify Timesheet Portal form for All Staff by having only one Operational (KTLO) Resource Plan that will display.
   - Currently, user must select from two plans and going to just one plan error-proofs the process.

3. Give clear guidance so people who provide inputs get it right the first time.
   - Refreshing all knowledge materials.

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# PROJECTED RESULTS

- More Efficient
  - Reduction in number of operational resource plans created by Resource Managers: 50%
  - Reduction in process time for users: removed decision point for each operational timecard

- Better User Experience
  - Timesheet process visible and easy for user

- More Accurate and Useful
  - Improved data accuracy for analysis and decision making around effective use of resources
  - Improved adherence to time submission
  - Resource & Time Dashboard
    - Increase in hours reported by month
    - Increase in timecard entries by unique users

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# NEXT STEPS

- Annual planning with each Executive Director in May will drive resource planning for FY25

- Implementation Timeframe: June, fully implemented by July 1 for FY25

# REFLECTIONS

- "The most important single thing is to focus obsessively on the customer. Our goal is to be earth's most customer-centric company."
  – Jeff Bezos

- Customer input is foundational to success. Start with what the customers needs and work backwards.

- The power of customer feedback is sorely missing from other methodologies – yet it's so important.

# THANKS!

Erin Daugherty

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