Example Company Resource Deployment Guide

How staffing decisions get made

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I. Introduction to Resource Deployment

The primary goal of a well-structured resource deployment process is to optimize the utilization of resources across the organization. Top professional services firms know that resource deployment is one of the core processes that must work flawlessly as it is both a constraint and driver of growth and success.

The purpose of this guide is to explain how the Company Resource Deployment Process works, who is involved, and what the underlying objectives and principles are behind resource decision-making.

At Company our objectives for resource deployment are:

- To maximize firm-wide realization

- To optimize resource deployment decisions so that our clients get the best possible talent

- To optimize resource deployment decisions so employees are assigned to projects in line with their interests, strengths, and personal and career goals.

These are ambitious objectives. In fact, at times these objectives may compete for priority. We can make the best possible decisions for Company by discussing, weighing, and managing important resource deployment situations as outlined in this guide.

Regions/National Practices manage the resource deployment process with oversight at the national level. The key to achieving our objectives is close coordination and cooperation between Regions, the National Practices, and the national office.

It would be impossible, even undesirable, to create a set of “rules” to cover every resource deployment situation that may arise. Instead, we have

developed a set of guiding principles. These principles are core beliefs that shape deployment decision-making enable us to assess trade-offs.
For example, if a “home run” opportunity emerges, the firm may be best served if critical individuals are pulled from current assignments. Even if the cost is high to a local office or region, this may well be the right thing to do for the company and the persons involved. Consequently, everyone involved in the resource deployment process needs to understand that special situations will require special handling.

In addition, it would be a mistake to think of the resource deployment process as mechanical and insensitive to the individual’s need for growth and development, as well as other factors such as heavy travel. The managers involved will make the best decisions, taking into consideration the long-term impact on the company and its employees, not just the immediate pressures of the here and now.

II. Guiding Principles

The following principles are the core beliefs that guide the resource deployment process.

1. **The Regional/National Practice Manager has primary responsibility and authority over Resource Deployment**
    - All deployment must be handled through the Resource Deployment System and Process. Project Managers should not contact employees directly to discuss a potential or actual assignment without the go-ahead from their Regional/National Practice Manager.
    - Employees within a region/national practice can be reassigned at the discretion of that region/national practice.
    - National Operations Manager monitors overall resource deployment.

2. **National retains primary responsibility and authority over deployment decision with broader, firm-wide implications**
    - Project involves multiple regions and/or Technology Competency Leads.
    - Deployment is for non-billable National Strategic Initiatives.
    - Deployment is for a Strategic Account.

3. **Booked business has priority**
    - The current project manager must be involved in any decision to remove an employee from a current project for reassignment.
    - We recognize that resource deployment often begins informally during the sales process, and that an individual who has been instrumental in selling the work may be the best choice to deliver the work.
    - Sales Prospect Opportunities may "reserve" an employee with following caveats:
        - Employee bid-key cannot be tied up too long.
        - At four weeks prior to the projected start date, regions may tentatively assign an employee.
        - Assignments are not final until the project is 100% booked and, until they are, those tentatively assigned will continue to show on the availability report with the reserved status noted.

4. **Maximize utilization of current resources**
   - If a person is not **fully** deployed, he/she is considered to be available for assignment.
   - National Operations Manager has central control over contractor deployment [this may prove untenable for specialty skills that are not needed in more than one place]. Use contractors when:
     - Skill set is not a core Company competence (e.g. Company does not need to stockpile its own creative talent...it can buy as needed. Same with Strategy consulting.).
     - If skill set is a core competence, exhaust internal and hiring options before using contractor.

5. **The most important principle is to exercise good judgment and remember that in the end, the goal of resource deployment is to do what is right for Company. To that end, it is vital to:**
   - Maintain accurate and up-to-date records of each person's status.
   - Share data freely to ensure that all people involved make informed decisions.
   - Factor in people's growth and development needs.

III. Roles and Responsibilities

We have identified a list roles and tasks that are critical to an effective resource deployment process. Completion of these tasks ensures efficient and informed decision-making.

It is important to know who in each region/national practice is responsible for completing each task and making the final decision. Some tasks may also require that someone be consulted prior to making a final decision or advised once a decision is made.

It is not necessary that parallel Organizational Roles between regions share the same responsibility, i.e. the Regional Resource Administrator in the East might be responsible for updating RAA, while in the West it is the Project Manager.

The following people may ultimately have roles in Resource Deployment:

- Branch Manager
- Business Development Manager
- Personnel Assignments Coordinator
- Functional Supervisor
- Project Manager
- Regional Manager

- Regional Operations Manager
- Regional Resource Administrator

The chart on the following page can be used as a tool to map clear lines of responsibility and authority for vital tasks. For each task, fill in who in each Region/National Practice is involved and their level of participation.

Key for the Roles

And Responsibilities Chart

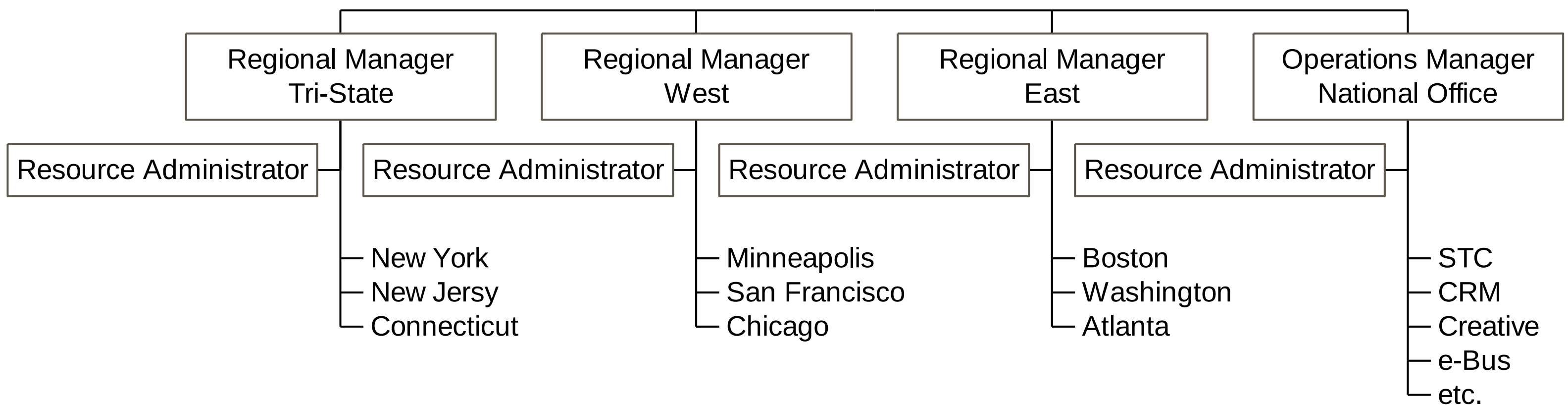
Role Participation	Definition
A	Person who is advised once a decision is made
R	Person responsible for taking the action
D	Person who makes the final decision
C	Person who is consulted before a decision is made

Roles and Responsibility Chart

Role/Task	Region			National Practices Creative(C), CRM, STC, e-bus, KM
	Tri-State	**East**	**West**	
1. Define project resource requirements (skills, knowledge, background) at onset of project				
2. Define project resource requirements (skills, knowledge, background) during project delivery if additions or changes needed				
3. List unfilled **project** roles by region: • Specific skills • Required domain knowledge and project background • Project description • Assignment duration • Project attributes (client work, on/off-site)				
4. List potential staffing needs of **sales prospects** (within 4 week horizon) by region: • Specific skills • Required domain knowledge and project background • Project description • Assignment duration • Project attributes (client work, on/off-site)				
5a. Create daily list of billable employees available part-time and full-time, now and in the near future				
5b. Identify potential talent pool for sales prospect				

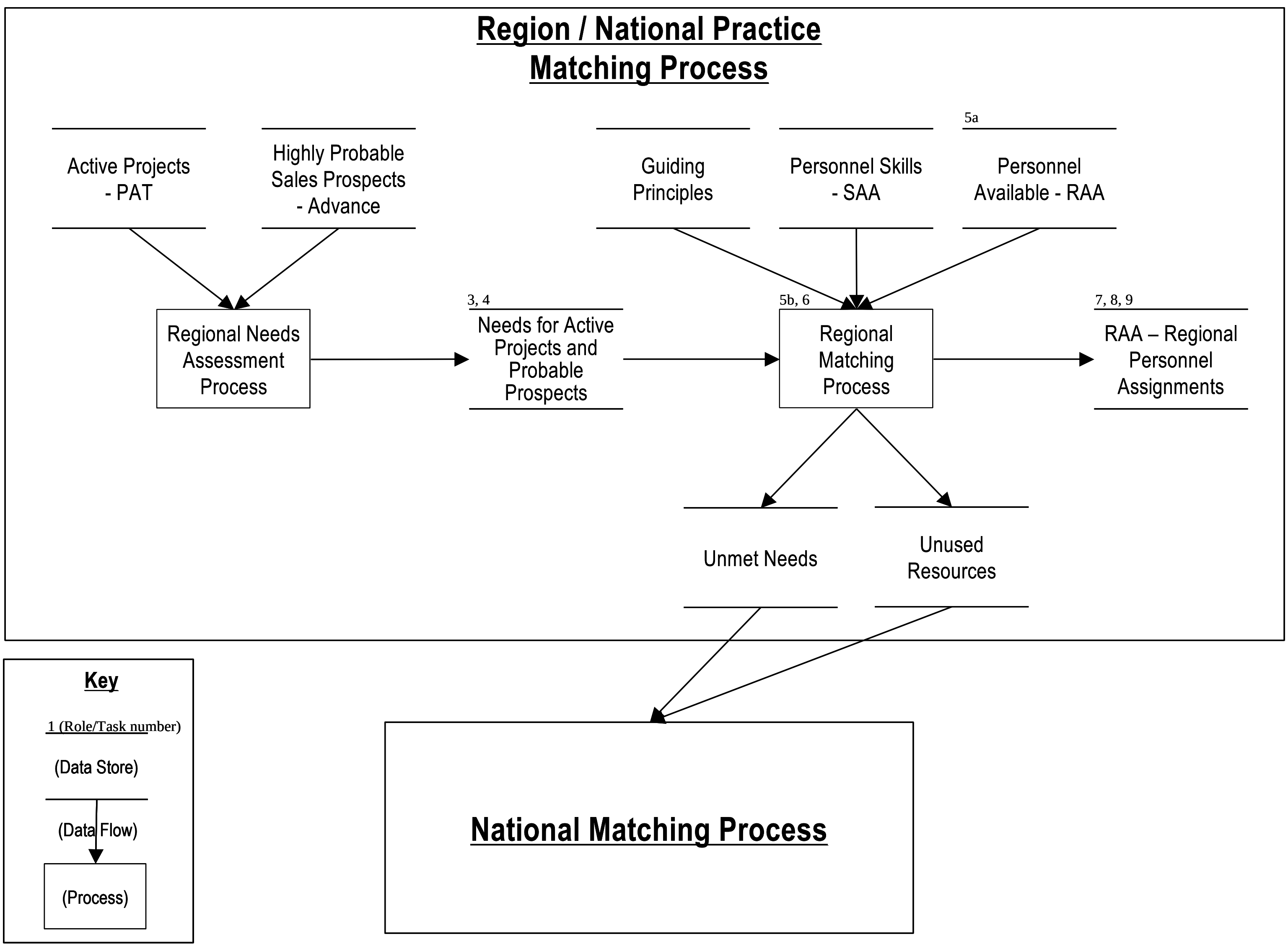
6. Assess open assignments against employee skills, knowledge, interests and career development plan				
7. Decide on employee assignments for booked projects				
8. Advise employee and chain of command about assignment and how the assignment was made (e.g. fit with project assignment, fit with client, align with employee career development plan)				
9. Update RAA System				

Organization of Resource Management Responsibilities



IV. *Resource Deployment Process Chart*

Each region will use a common system to track and regularly report on resource deployment assignments. The ability to share resources across regions requires a common approach and process for efficient reporting and decision-making.



V. Related Processes

The resource deployment process is part of a larger system that drives Company's business growth and day-to-day operation. This section defines other processes that interact with the resource deployment process.

1. **The Sales Pipeline –** Once an opportunity is categorized as a "prospect" a pool of potential candidates is identified. This enables various candidates to be evaluated for "Best Fit." It also allows for the identification of skills that are scarce and need to be augmented through hiring and/or training.

2. **The Training Plan –** The resource deployment process will identify anticipated down-time opportunities that can be used to assign employees to training. The resource deployment process will identify skill that are scare and need to be augmented through training current employees.

3. **The Hiring Plan –** The resource deployment process will identify unique skills and trends in skill requirements. This feeds into the hiring plans for each national practice and geographic region.

4. **The Career Development Plan –** (Company to add language)

VI. Resource Deployment Meeting

This section describes the primary meeting that occurs at a national level to monitor and review the resource deployment activity across the organization.

Meeting Description

- Objective: To make visible current and anticipated resource needs. To establish a forum where alternative solutions can be discussed in order to optimize staffing decisions

- Meeting Leader: National Operations Manager

- Meeting Facilitator: National Resource Manager

- Timing: Conference call every Monday at 3:00 pm EST

- Duration: 1 hour

- Participants:
  - Regional Resource Administrator
  - Regional Manager (optional)

Meeting Agenda

- Review current unfilled client needs

- Review list of available employees and match to current needs

- Review new hires to start within 2-4 week horizon

- Review Sales Prospects (4 week horizon) and identify a potential talent pool

- Review current internal strategic initiatives and current and projected staffing needs

VII. Special Cases

The following outline some of the situations that are likely to come up. For each case is it noted where the decision-making authority will reside.

1. Assigning a billable employee to a non-billable task (e.g. Company is client, business development) – decided at the national level.

2. Taking an employee off a part-time assignment to fill a full-time assignment – decided within region or at national office if between regions.

3. Taking an employee off an assignment for performance or client dissatisfaction reasons – decided by Regional Manager with input from current project manager and HR.

4. Taking an employee off a training assignment to assign to billable work – decided by Regional Manager.

5. Deciding to use a contract resource to fill a client requirement – recommendation from Regional Manager, National Office Operations Manager makes decision.

6. Employee requests reassignment because current project requires extended travel or for personal reasons – decided within region or at national office if between regions, with concurrence of current project manager.

7. Employee requests to be taken off a client account – decided within region or at national office if between regions, with concurrence of current project manager.

8. Employee requests reassignment for career development reasons - decided within region or at national office if between regions, with concurrence of current project manager.

VIII. Resource Deployment Tools

The table below outlines the Company systems that feed information to the resource deployment process, and systems that depend on the resource deployment process for accurate and current information. In addition to the existing application, this table also acknowledges and identifies future enhancement needs that will increase the utility of the system for the purpose of resource deployment.

Tool/Information System	**How It Is Used**	**Future Enhancements**
RAA	Tracks assignments for booked work. Produces information on employees who are fully assigned	Projecting resource assignments beyond work which is actually booked
SAA	Tracks skills, technical and domain knowledge by individual. Provides a list of individuals against search criteria taken from a defined assignment	Tracking an individuals project experience, previous work experience and career goals and development plan.
PAT	Tracks booked projects. Information is used for project management and billing	
Sales Support System (Advance)	Tracks sales opportunities. Provides insight into projects that may require staffing in the near horizon	Include for each sales prospect a detailed list of project roles and required skills, knowledge and experience required. Also include the project duration and nature of work (e.g. client site, travel)
Enterprise Information System (EIS)	*(Company to add text here)*	