

# Seven Easy-to-Apply Best Practices with PlanningForce

Increase your company's overall performance by taking advantage of some of the best practices that PlanningForce can help you implement.

# Topics covered in this whitepaper

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1. Resources
2. Profitable Projects
3. Risks and Incidents
4. The Time-To-Market Battle
5. Performance of the Planning Unit
6. One version of the truth
7. Less manual calculation

# 1. Resources



*Finding the right balance in your workforce*

## ADVICE

Resources should be placed at the center of the planning process in order to **develop an effective human resource management strategy** aimed at optimizing recruitment, training, skills recognition and overall motivation.

## HOW

By planning resources based on their specific skills, experience, availability and efficiency in order to **optimize the use of each resource** in the short and long term.

# Practically

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## STEP 1

- ✓ Qualify and quantify the **optimal workforce** in relation to the needs of your project portfolio.

## STEP 2

- ✓ **Compare** this optimal workforce with the existing workforce (internal and external).

## STEP 3

- ✓ **Design and test scenarios** that match task requirements and resource offers through simple HR techniques (recruitment, dismissal, training, use of contractors and temporary workers.)

## STEP 4

- ✓ **Rank the scenarios** according to the cost of each one and the expected return and choose the one that offers the best return/cost.

## STEP 5

- ✓ **Implement** your decisions and **monitor** their effectiveness.

# Did you know?

A majority of companies **(71%)** still use Excel to plan their resources.

The biggest challenges in planning are related to **resource management**, **project selection/prioritization** and ... appropriation of a new planning solution.



## 2. Identification of profitable projects

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### ADVICE

A **single project does not always have a positive impact on the overall portfolio value**, even if the expected revenues of this project seem very attractive. It is important to give more importance to the marginal effect of a project rather than to the theoretical financial returns.

### HOW

You should ask yourself, before adding a new project:  
**Is the real added-value of an additional project positive?**

# Practically

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## STEP 1

- ✓ **Calculate** the expected revenues generated by your existing project portfolio

## STEP 2

- ✓ Design and **test several planning simulations** including this additional project

## STEP 3

- ✓ **Compare the revenue forecasts** of each of these simulations to the initial revenue forecast

## STEP 4

- ✓ **Reject this project** if, at the end of the project, the cumulated Cash-flow has not been increased

**OR**

- ✓ **Modify the composition of the existing portfolio** to make it globally more profitable with the new project than without it.



# Did you know?

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More than half (**55%**) of the companies reviewing their project portfolios monthly perform analyses and make decisions based on outdated or incomplete data

Companies that have implemented PlanningForce significantly **increase the ROI of their project portfolio.**

**RETURN ON  
INVESTMENT**



# 3. Risk & problem anticipation



*Improve the reliability of the delivery dates*

## ADVICE

**Risks** (illnesses, unplanned tasks, longer tasks, scope changes, ...) and **interruptions** are frequent throughout the life of a project. These events are often so frequent that **statistics on their occurrence or magnitude** may exist. In this case, we will take advantage of this information to better plan future projects.

## HOW

By defining several **risk categories** and adding them to your projects and resources, you will **calculate more realistic project delivery dates** and reduce uncertainty and stress.

# Practically

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## STEP 1

- ✓ Find out the different **categories of risk** to which your projects are subject and for each of these categories, try to **estimate the value of these risks as a percentage of occurrence and magnitude** per unit of time.

## STEP 2

- ✓ Apply these risk factors to the projects and resources that are subject to them.

## STEP 3

- ✓ Design positive (risks are not observed) and negative (most risks are observed) scenarios.

## STEP 4

- ✓ Compare these scenarios **through performance indicators**, in the form of "radar" graphs, and select the schedule most in line with your assumptions, objectives and constraints.

# Did you know?

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**Only a third of all projects** were successfully completed on time and on budget over the past year

Only **40%** of projects met schedule, budget and quality goals



# 4. The Time-to-Market battle



*Winning the Time-to-Market battle is question of agility*

## ADVICE

A plan is **often made once and never change**, or it is **oversimplified** with **rough estimates**. You can get so much more from an agile planning process.

**Winning the Time-to-Market battle is question of agility.**

## HOW

Thanks to its powerful planning and scheduling engine, PlanningForce will allow you to re-plan your projects and resources as often and as quickly as you want. **You will be able to better reallocate your resources dynamically to stay in line with your strategic objectives.**

# Practically

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## STEP 1

- ✓ Centralize all your projects and resources.

## STEP 2

- ✓ Take into account **the constraints** on your projects:
  - Project priorities
  - Promised delivery dates
  - Links between projects

## STEP 3

- ✓ Launch the planning engine to plan all of your projects with available resources - so **you'll know realistic end dates for each one.**

## STEP 4

- ✓ Regularly **integrate the progress** to know what remains to be done and restart the planning engine to calculate the variance on the end dates.

## STEP 5

- ✓ **Test different scenarios** and choose the one that allows you to meet the promised end dates.

# Did you know?

With PlanningForce, it is easy to **test several scenarios** to be prepare in case the worst happens ...

- ✓ Losing some critical resources
- ✓ Changing some of the
  - Project priorities
  - Target end dates
- ✓ Adding unforeseen activities
- ✓ Adding longer and more difficult tasks
- ✓ Encountering delays in some critical supplies





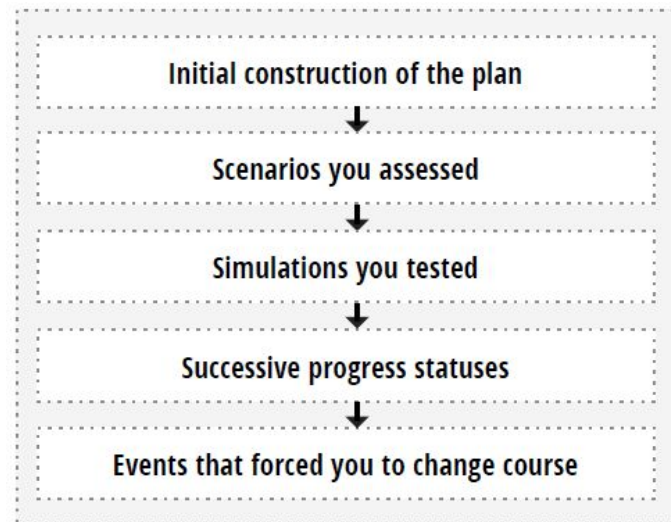
# 5. Performance of your planning unit



## *Create a true corporate memory*

### ADVICE

The different stages in the life of your projects are pieces of your company's history that you **should record to help you develop future strategies** that will help you increase the performance of your planning organization.



### HOW

Have a planning system that **keeps track of all relevant information** and returns it to you when it comes to developing and implementing strategies to reduce costs and increase your revenues and profits.



# Practically

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## To increase performance

- ✓ Manage your resources dynamically thanks to different **strategies to cover your needs** (fixed teams, flying teams, subcontracting, temporary workers, ...)
- ✓ Anticipate low **activity cycles** to better counter them
- ✓ Always have **tasks ready to schedule**
- ✓ Anticipate **interruptions and incidents**

## To increase profits

- ✓ Develop the **expertise of your internal resources** where they have the highest added value
- ✓ **Adapt your prices dynamically**
- ✓ **Negotiate framework agreements** with third party actors
- ✓ Leverage your organization's reserves of productivity gains

# Did you know?

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With PlanningForce, it's easy to **test multiple scenarios** to prepare for business downturns or to **quickly detect and seize good opportunities** when they arise.

Start elaborating and implementing strategies not just to **reduce costs**, but also to **increase your turnover** and your profits.





## 6. One version of truth

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*Break down the walls between departments*

### ADVICE

Improve **collaboration between all departments** and actors in the company with systems and processes that eliminate barriers between your employees.

In the end, not only will your organization benefit, but your employees will also be grateful.

### HOW

Promote the implementation of transversal tools and integrated processes. **Use your planning system as a vector of this evolution** and ensure that there is, at all times, within your information systems only one version of truth.

# Practically

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- STEP 1 ✓ Design an **organization-wide competency matrix**
- STEP 2 ✓ Design **project templates** and/or project creation rules to be applied by all project managers.
- STEP 3 ✓ Encourage queries about **skills** rather than named resources.
- STEP 4 ✓ Prefer to use the concept of **workload** rather than duration
- STEP 5 ✓ Estimate workloads based on the effectiveness of **standard profiles**, not individual employees.
- STEP 6 ✓ **Plan all your projects concomitantly and transversally**, including all phases and departments

# Did you know?

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Companies that have implemented PlanningForce have seen a **14% increase in the productivity of their teams** and a 35% increase in the number of projects completed on time.

The cost of the investment in PlanningForce is **recovered in less than 9 months.**



# 7. Less manual calculation

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## ADVICE

The **first phase** of a project, the development of the project plan, typically **requires a lot of your time**.

Even more work is required when you want to **allocate** resources efficiently, or when you want to **change** your 'ideal' plan to a 'realistic' one.

**Time spent at planning should be drastically reduced !**

## HOW

By benefiting from a **planning/scheduling engine** that builds an **optimized plan in seconds**, whether it is a **single project** or a portfolio of **hundreds of projects**.

# Benefits you would get

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## SCALABILITY

- ✓ Manage dozens or thousands of tasks and resources with the same ease

## SPEED

- ✓ Build an optimized schedule in seconds from short to long-term

## SIMULATIONS

- ✓ Create several simulations to test different work scenarios and present them to your colleagues.

## CHANGE REACTIVE

- ✓ Take account of progress and changes and re-plan on the spot

## TEMPLATES

- ✓ Use templates to create your future projects and tasks

## REALISTIC REPORTING

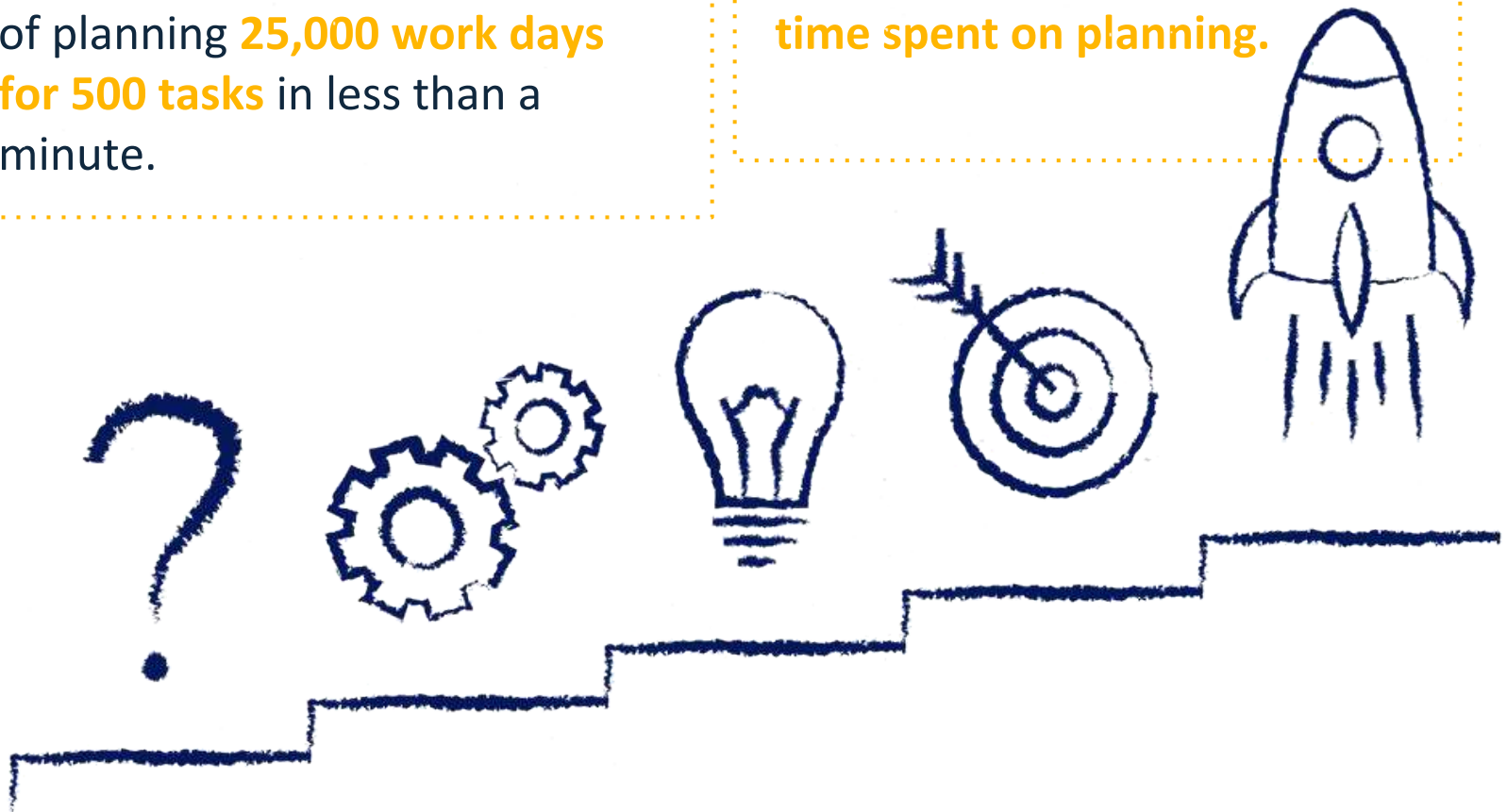
- ✓ Generate and read intelligent reports as clear summaries and dashboards



# Did you know?

A planning calculation engine such as PlanningForce is capable of planning **25,000 work days for 500 tasks** in less than a minute.

Companies using PlanningForce **save on average 45% of the time spent on planning.**



# So You Want to Boost Your Business Performance?

Let's Get Talking.

Visit us at  
[www.planningforce.com](http://www.planningforce.com)