




THE BOSS'

Checklist for successful resource forecasting

By René Dalsgaard, CEO at Orbit Online A/S

Are you spending your workday navigating and booking resources in multiple spreadsheets? If so, you are probably a little unsure of whether your data is 100% up to date and perfectly mirrors reality – and you are not alone.




What if you were always able to

-  avoid the time-consuming task of copying data on multiple worksheets
-  access a single Gantt Chart view, where the data is always up to date
-  manage overbooked resources easily and on time

I'm convinced that it would allow you to work more effectively and free up time to focus on what would really provide value to you, the management and your colleagues.

The first step to more efficient and successful resource management is to organise the required basic data.

To manage resources, it is essential to know

-  **who** should carry out the assignment
-  **where, and how long** the assignment should last
-  **when** the assignment should be done

If you are already on top of #1 to 3, you can jump straight to #4, which allows you to digitise your data and take it to an operational level. This is where your data can make a real difference in your life.

If you're ready to put a stop to an inefficient and laborious way of doing things, then this guide is all you need.

I wish you every success in your work.



Best wishes
René, CEO

Table of Contents

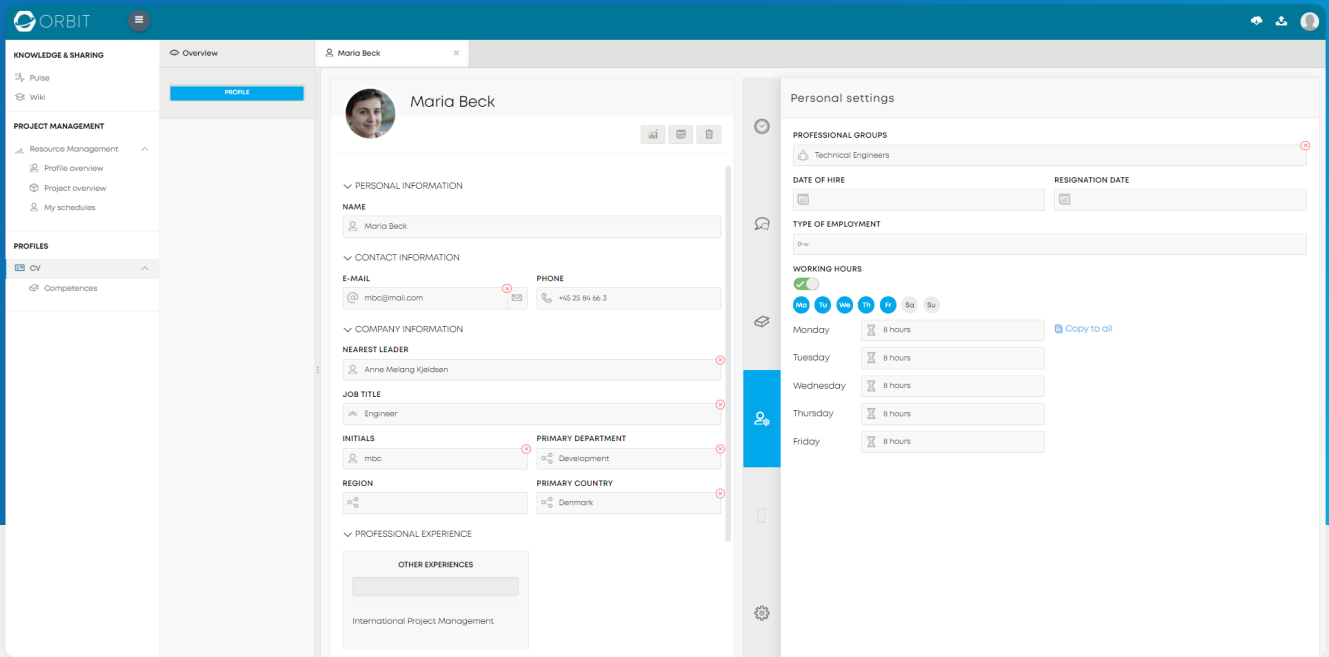
1. Organise employee data

2. Know location and duration of project

3. Get a handle on the start date and deadline

4. Digitise your data

Try the Orbit Resource Planning tool for 7 days



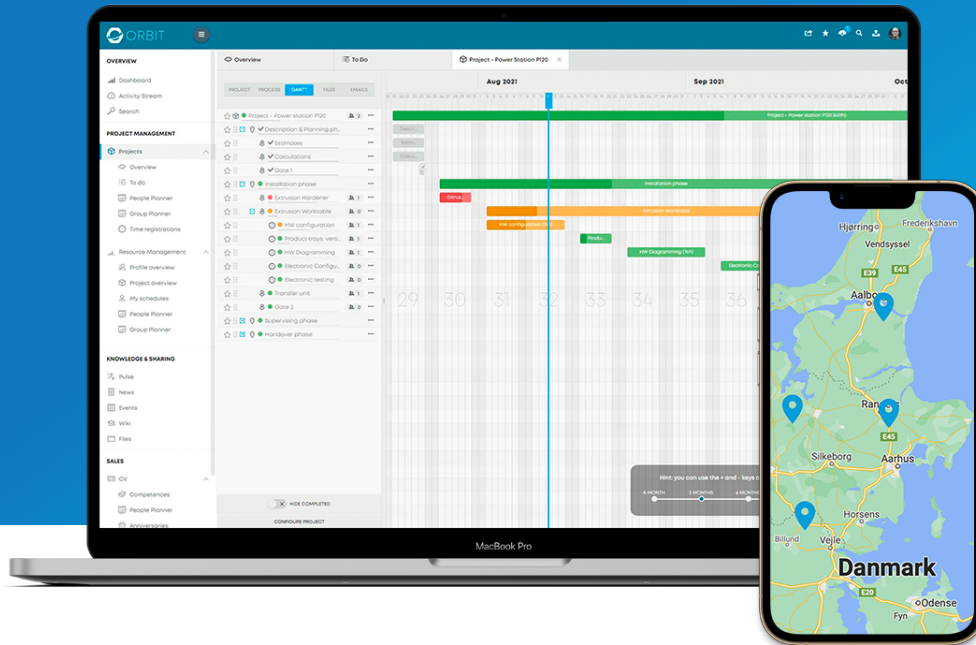
1. Organise employee data

You may already have employee data organised in an HR system. Otherwise, the first step is to create profiles for each employee and add a minimum of base data:

- Name**
- Contact information**
- Terms of employment**
- How many working hours per day**

To gain an optimal overview of all employees, the obvious course to take is to organise the data in a way that adds the most value to your organisation and whether you wish to manage your employees according to, e.g.:

- Project teams**
- Competencies**
- Departments**



2. Know location and duration of Project

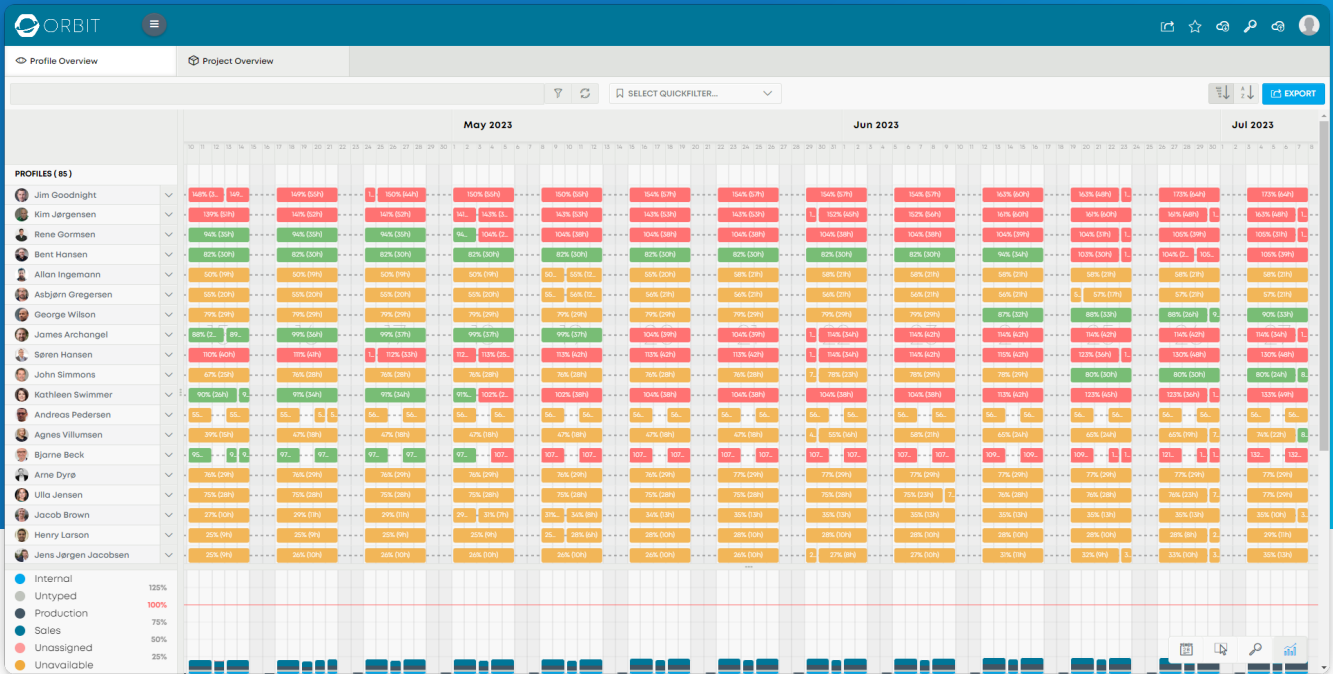
To streamline your planning, you need to have a set of standardised project data integrated into our project model. This data has a massive impact on which resource you can allocate to each assignment as it allows you to match assignment requirements with your employees' master data –e.g. competencies – which you defined in the previous chapter.

Pay attention to, for example

- **Assignment estimation:** Often, your resources are working on more than one project. If your estimation of (sub)tasks associated with the project are unrealistic, your resource overview will ultimately also be unrealistic. You may need to continuously customise your project templates to give you a realistic estimation. In some cases, you can lift estimates from other systems such as SAP, for example.
- **Location:** Some phases of your production are executed at another site. Therefore, you should include the geographic location of the assignment as a default data point in your project data.

Nice to know

Use historical data from previous projects, this gives you a data-based basis for estimating assignments that reflect reality.



3. Get a handle on the start date and deadline

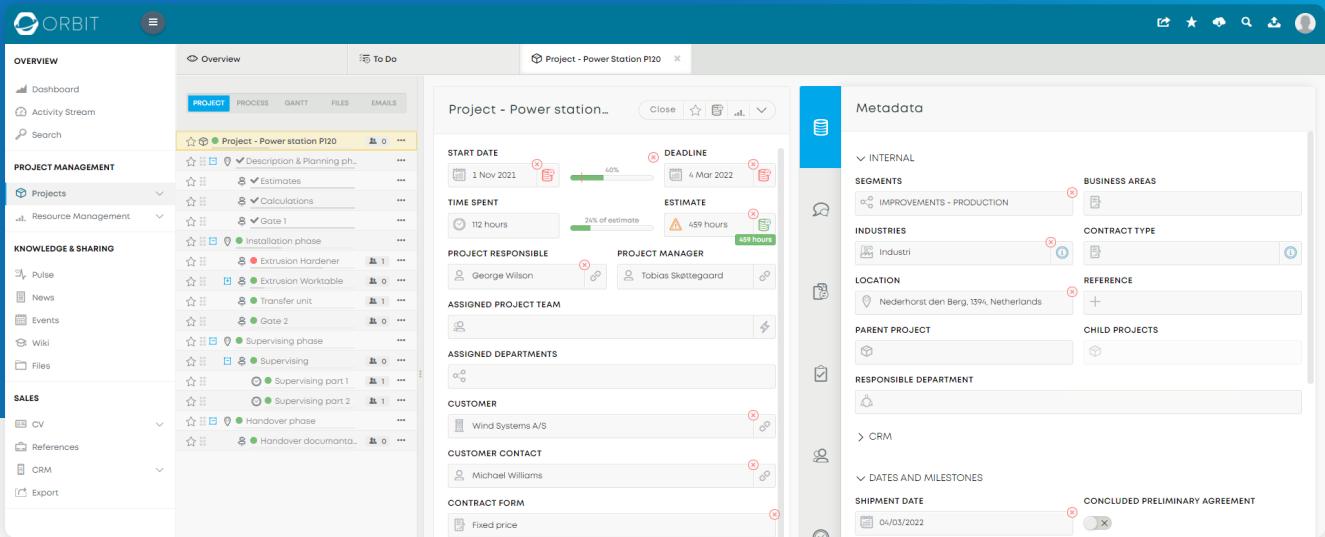
Depending on how you forecast your projects, you need various approaches to resource allocation. However, whatever way you look at it, you need a tool that gathers your data from profiles and projects and gives you a complete overview.

- **Resource-driven deadline:** The number of actual hours worked determines when you can start production.

Case! At SKAN, they estimate time of delivery in 90 seconds

By implementing a standardised approach to project data and resource allocation, SKAN's order handler can now contact the company's business unit directors, who can provide a precise forecast for the production and present a realistic date of delivery upfront to the interested leads. All in less than 90-seconds.

- **Agreed deadline:** This type of deadline requires you to estimate whether you need to allocate additional resources at certain times in order to meet the agreed deadlines.



4. Digitise your data

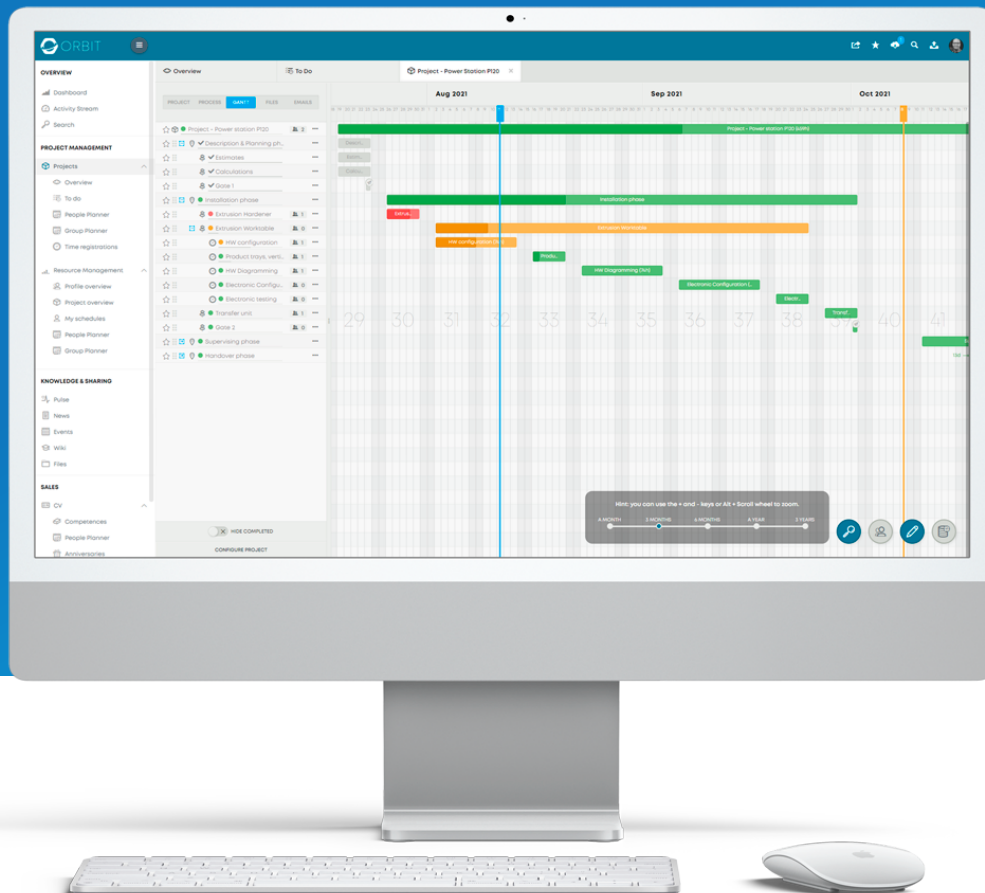
Once you have organised your business data, you will need a platform to collect data and optimise your resource planning work.

Succeed in implementing data-based resource management

An IT solution is never better than its implementation success. If the implementation is dictated from above without involving the end-users, the new solution might never succeed because the users revert to their old ways.

So! Here is some advice if you are about to implement a new resource management standard:

- Choose a user-friendly solution. To succeed, you need an intuitive platform that is in line with user behaviour
- Be sure to implement a standardised approach to resource management and data processing
- Integrate the new system with your other data systems and use the data you already have
- Explore and analyse which data and workflows can be automated
- Measure the impact and use data to make your resource management more accurate



Try the Orbit Resource Planning tool for 7 days

There are plenty of platforms that can organise your data and contribute to the efficient planning and execution of your projects.

Our platform consists of several tools. Together, they create synergy between data across your organisation. The platform is designed to provide an optimal and intuitive user experience.

A test server is set up and ready for you to try our resource planning tool for 7 days.

[Start your test period now](#)