



Quanticate

Juggling Balls and Resource Management: Strategies from a CRO perspective

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- Introduction
- Functional Service Provision (FSP) versus Fixed Price (FP): Challenges of satisfying both methods
- Resource Planning and Managing Resource Challenges
- Resource Allocation and Tracking
- Resource Forecasting
- Resource Strategies
- Staff Retention
- Questions

Functional Service Provision (FSP) versus Fixed Price (FP)



What is FSP?

- Functional Service Provision
- Potentially ring fenced resource
- Invoicing
 - “hourly rate for each level of resource” x “number of hours worked”
- Resource is viewed as an “extension” of the Client project team
- Programming is performed on Client systems
- Client SOPs and standards are followed

Functional Service Provision (FSP) versus Fixed Price (FP)



What is FP?

- Fixed Price - traditional method of outsourcing
- Work to agreed budget
- Resource (FTE) requirements calculated based on quote provided, i.e. number of programming hours required
- Invoicing
 - Payment received on an agreed milestone basis
- Programming performed on Quanticate systems
- Quanticate SOPs and standards followed

- Work Requests are provided by the client detailing:
 - Estimated start and end dates
 - Study duration
 - Expected resource requirements
 - Summary of study requirements including complexity
- Each client has a nominated “Work Receiver”
- Resource is assigned based on:
 - Estimated timelines
 - Resource availability forecasts
 - Complexity of work
 - Prior project knowledge

- Resource Availability
 - Utilise Resource Management Tracking Tool (PPMS*) to identify available resource during expected study period
 - Identify available Project Lead
 - Identify suitable team
 - Consider previous knowledge of client systems
- Project Lead assigned and is responsible for:
 - Performing role of key client contact
 - Review of all available study documentation
 - Arranging client Kick-Off meeting
 - Leading team of programmers through to study end

** PPMS - Project Portfolio Management System*

Managing Resource Challenges - FSP



- Long term resource requirements generally unknown
- Potential underestimation of resource requirements
- Assessing and planning required client training
- Effects of shifting project timelines:
 - Managing resource requirements
 - Sudden resource shortfall
 - Sudden resource availability
 - Maintaining project knowledge and experience within the assigned project team

- Resource agreed based on Work Request provided by the client and Quanticate Quote Model
 - Work Request
 - Usually provided well in advance of study start detailing:
 - Project start and end dates
 - Summary of study requirements
 - Clear project expectations
 - Roles and Responsibilities (Client & Quanticate)
 - Quanticate Quote Model
 - Estimates based on initial scope of project
 - Total number of hrs by function are calculated
 - Determine number of FTEs required to fit to budget
- Determine “team fit” based on experience / knowledge required

- Resource Availability
 - Utilise Resource Management Tracking Tool (PPMS*) to identify available resource during expected study period
 - Identify available Project Lead
 - Identify suitable team
- Project Lead assigned prior to Bid Defence and responsible for:
 - Only expected number of FTEs assigned to the project
 - Budget hours reviewed and tracked on a daily / weekly basis
 - % completes updated on a weekly basis
 - Resource / budget issues raised swiftly
 - Project updates provided on a weekly basis
 - Project progress tracked daily

* PPMS - Project Portfolio Management System

Managing Resource Challenges - FP



- Managing shifts in project timelines
- Managing additional resource requirements when faced with changes in project scope
- Additional resource not readily available to cover shortfall
- Training requirements for additional team members
- Assigning Project Lead at Bid Defence stage

PPMS

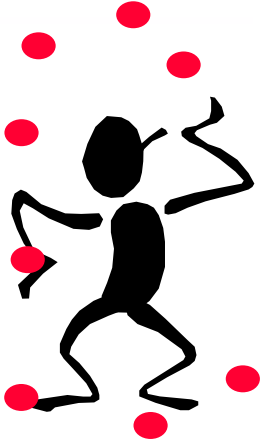
- Resource demand and supply entered
 - Work accepted
 - Work expected
- Graphics and Reports available to show overall resource status
 - Strategic Resource Graph
 - Resource Capability versus Allocated by time
 - Resource Plan
 - %Allocation by Time for each programmer by role
 - Over-Supply
 - Compares Supply with Demand entered
- Clear projection of resource availability
- Peaks and troughs easily identified

FSP

- Regular Project Update meeting held between Head of Programming, FSP Manager(s) and Client to discuss:
 - Project Status
 - Resource issues
 - Resource projections: a clear 3 month resource plan is requested
 - Portfolio of work

FP

- Regular Project Update meeting held between Head of Programming and Project Lead to discuss:
 - Project Summary
 - Identify Change of Scope
 - Identify resource shortfalls
 - Project Efficiency review



- Weekly resource meetings held between Head of Programming and Principal Programmers to discuss:
 - Project Status
 - Resource issues
 - Review of resource allocations across the function (PPMS)
 - Determine resource availability / shortfalls
 - Identify unexpected peaks & troughs
 - Identify free resource due to shifting timelines
 - Juggling resource (Availability vs Shortfalls)
 - Identify available resource and assign to project based on knowledge & experience levels
 - Consider location of project to centralise resource
 - Discuss new Work Requests
 - Determine if resource can be assigned
 - Request delay to project start if suitable resource is unavailable.



FSP

- Resource forecast reports provided to the client highlighting peaks & troughs within allocated “pool” of resource

Internal

- PPMS resource capability data utilised by other Functions:
 - Finance: Revenue Forecasting
 - Business Development: Sales Forecasting
 - Human Resources: Recruitment Plans

Methods Implemented

- Determine resource availability based on pool of programmers
- Strive to provide employees with good work life balance
- Utilise Recruitment division for additional FTEs when required
- Re-prioritise projects if resource is available
 - Request project started sooner than expected
- Transparent and open communication with the client:
 - Gain trust and build a good working relationship
 - Good communication flow
 - Provide current project plans
 - Always deliver to scope

Methods Implemented cont.

- Hold regular meetings with the client
 - Raise concerns as early as possible
 - Early client communication regarding changing timelines, resource or scope is imperative
- Ensure estimated resource forecasts of at least 3 months are provided by the client
- Identify short term projects to cover delayed projects
- Maintain a core team of programmers on all Fixed Price work
- Maintain a core team of programmers when specific TA or project knowledge is required
- Implement efficiencies where possible

Employer of Choice

- Staff retention is a key company objective
- Strive to provide employees with good work life balance including:
 - Sensible workload
 - Effective resource management
 - Providing staff development opportunities while maintaining client expectations and meeting deadlines
- Monthly 1x1 meetings held with Line Managers
 - Project status
 - Resource availability
 - Objectives
 - Personal Development Plan / Training needs

Questions?

Resource Graph

Back-up



Resource Allocation Dashboard

Role: SSP | Senior SAS Programmer

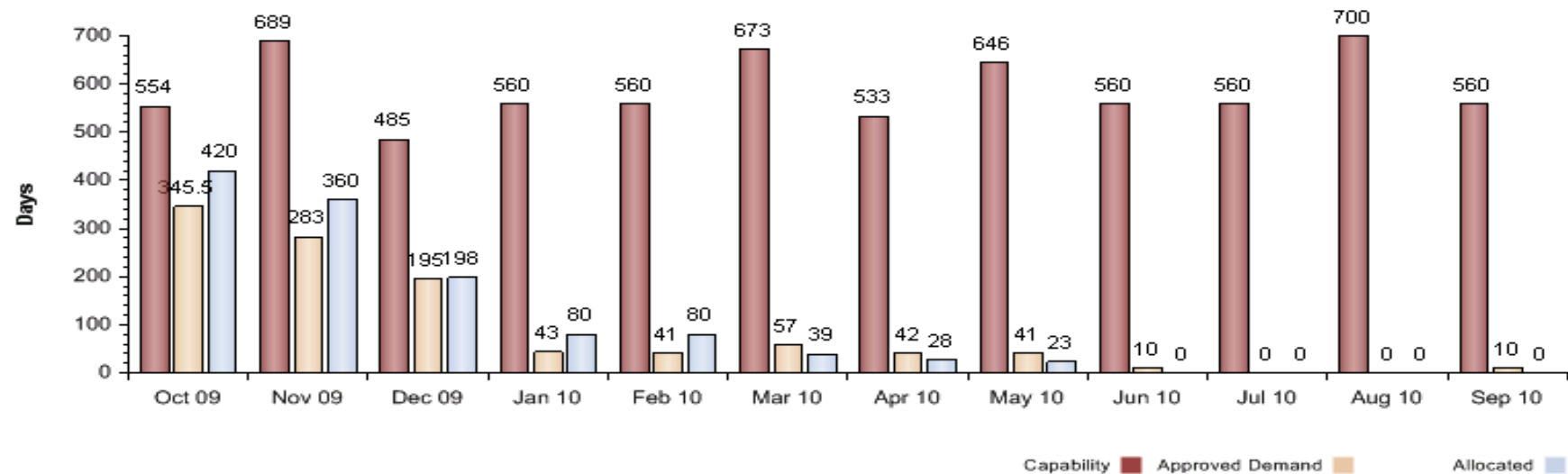
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Strategic Resource Graph Resource Plan Remaining Demand Over-Supply Reports

Strategic Resource Graph

Actions ▾



	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	Jul 10	Aug 10	Sep 10	Total
Capability	554	689	485	560	560	673	533	646	560	560	700	560	7080
Approved Demand	345.5	283	195	43	41	57	42	41	10	0	0	10	1067.5
Allocated	420	360	198	80	80	39	28	23	0	0	0	0	1228

Resource Plan

Back-up



Resource Allocation Dashboard

Role: SSP | Senior SAS Programmer

Filter: Off



Strategic Resource Graph Resource Plan Remaining Demand Over-Supply Reports

Approved Resource Plan

Actions ▾

Show: Utilisation ▾

Resource Project	W/C 12 Oct	W/C 19 Oct	W/C 26 Oct	W/C 2 Nov	W/C 9 Nov	W/C 16 Nov	W/C 23 Nov	W/C 30 Nov	W/C 7 Dec
Salaja Akkadan	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +
Anne Barfield	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +
Gemma Bishop	100% +	100% +	100% +	40% +	40% +	40% +	40% +	40% +	50% +
Martijn Busselen	100% +	100% +	100% +	0% +	0% +	0% +	0% +	0% +	0% +
Stuart Chalmers	100% +	100% +	100% +	100% +	100% +	100% +	100% +	125% +	0% +
Kamila Duniec	94% +	94% +	94% +	94% +	75% +	94% +	94% +	94% +	94% +
Wouter Engelbrecht	0% +	0% +	0% +	0% +	0% +	0% +	0% +	0% +	0% +
Liza Faber	100% +	100% +	100% +	100% +	0% +	0% +	0% +	0% +	0% +
Alan Ford	100% +	100% +	100% +	100% +	100% +	100% +	100% +	20% +	0% +
Mark Fowler	25% +	50% +	75% +	0% +	0% +	0% +	0% +	0% +	0% +
Jenny Gandhi	100% +	100% +	100% +	100% +	60% +	0% +	0% +	0% +	0% +
Kye Hodgson	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +
Steve Hull	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +
Piotr Karasiewicz	94% +	94% +	94% +	94% +	94% +	94% +	94% +	94% +	94% +
Emanuela Komosinska	94% +	94% +	94% +	94% +	94% +	94% +	94% +	94% +	0% +
Marcus Montoya	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +	100% +



User Dashboard

Overview Assignments My Resources My Supply Milestones Approvals Risks / Issues 2.0 Lessons Learned **Reports**

Reports

Report Title	Description
ADM 1.0 Timesheet Detail Report	ADM 1.0 Timesheet Detail Report
MS 1.0 Milestone Report	Display Milestones for a selected Project
MS 2.0 Milestone Changed Report	The report shows changed made to Milestones. The report will only show confirmed Milestones but will display Milestones regardless of roll up level or published flags
MS 3.0 Milestone Detail Report	The report provides core information surrounding Milestones stored in the system. The report will only show published Milestones.
PRJ 1.11 Future Supply and Capacity Analysis	Displays the supply and capacity of resources within a chosen date range, with a variety of grouping options.
TS 1.0 Timesheet Summary Report	Main timesheet report - Allows user to make numerous selections, including report grouping and grouping order.
TS 1.1 Timesheet Detail Report (With Notes and Activity Filter)	Detailed Timesheet Report by Date, Resource, Project and Activity
TS 1.10 Daily Timesheet Completion Analysis	Displays rate of daily timesheet completion per resource, by department. 100% = All timesheets are completed on the day of the time entry. 0% = No timesheets were entered on the day of the time entry.
TS 1.2 Timesheet Exception Report	Shows Resources who have not booked a specified amount of time in a given period
TS 1.4 Holiday Summary 2008	Shows number of days holiday taken, per department, per resource, per month of 2008.
TS 1.4.1 Holiday Summary 2009	Shows number of days holiday taken, per department, per resource, per month of 2009.
TS 1.5 Sickness Summary 2008	Shows number of sick days taken, per department, per resource, per month of 2008.
TS 1.5.1 Sickness Summary 2009	Shows number of sick days taken, per department, per resource, per month of 2009.
TS 1.6.1 Non-Billable Time Analysis	Displays the split of billable and non-billable time for a variety of user-selectable PPMS entities