



## TenStep Supplemental Paper

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### **Workload Planning is an Ongoing Process of Mapping Resources and Priorities**

One of the primary functions of management is to keep the entire staff busy on the highest priority work. People, supplies and money are too precious to spend on work that is not of the highest business value. On the surface, this can seem like a fairly simple process. However, there are a number of elements that make this process effective (or less than effective). Let's say, for instance, that you are an IT department manager with sixty people. Let's look at some of the elements of this process from a manager's perspective.

#### **You must know your available resources**

Since you are the department manager, you should know what resources are available to you. You know that you have sixty people, other resources such as equipment and software, plus available budget for training and other expenses. Let's focus specifically on people. Understanding your resources means more than just knowing how many people you have. What you really need to understand is the capability of the resources. Because of the nature of the IT discipline, these people are going to have different skills, experience and responsibilities. If the company has work that requires systems development skills, and the people who work for you have skills in communications and networks, you obviously cannot do the work in your department. Likewise, let's say your highest priority work is a new project. If you do not have project managers and senior people available, you cannot do that particular work at this time.

#### **You must also understand business priorities**

The second component of workload planning is to understand business priorities. Again, this is easier said than done. This is not a prioritized list according to the IT manager. This list of work must be prioritized by the client. Depending on the nature of your department, you may have a variety of responsibilities. Let's say, for instance, that your department is responsible for a number of IT business applications. You may have some people that are doing support, which is very important. You may have some people working on enhancements of existing applications, and some people working on new projects. In addition, you may be doing this work for more than one client group.

The workload prioritization process can be fairly complicated. First, you need to make sure that existing applications are reliable and stable, so you may allocate people to the support process first. Then you have many, many enhancement requests and other requests for more sophisticated projects. You must be able to judge the relative priority of all of this work and make sure you understand which work is most important.

#### **Workload Planning**

If you understand your available resources and the business priorities, you can establish a process to map the people against the needs. This is not a one-time process. In most



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companies, this workload planning process usually takes place monthly, usually at the end of the month or the very beginning of the next. The overall process is as follows:

- First, determine your people's availability by estimating the number of hours that each person has available to work over the next three months. To do this, you need to account for vacation, training, holidays, management time, etc.
- Re-validate whether there are any changes to the people who are working on ongoing support and operations. This work normally does not change a lot from month to month. The assumption is that if a person is working primarily on support or ongoing operational work, they are probably going to be allocated to that type of work on an ongoing basis. These people are allocated first, since the support of current systems is usually the highest priority work in the department.
- Next, review the work currently in progress, as well as the people allocated to that work. Do a quick check to validate that this work is still valuable and that priorities have not changed. Since the work is in progress, it is assumed that it is of high priority. However, sometimes work that is in-progress needs to be stopped or deferred if other work is prioritized ahead of it.
- Look at staff over a three-month period to determine who is becoming available this month and in the next two. This list of people is mapped against the client work that is of highest priority. If possible, the available resources are applied directly to the highest priority work. However, sometimes compromises are made. For instance, three people may be becoming available next month. However, they do not have the right skills to do the highest priority work. You could try to train the people, but it is more likely that you will look down your priority list for the first work that they have the right skills for. This may mean that the third priority work gets assigned; while the first two priorities get deferred for a little bit until the right resources are available.
- After a first pass has been made, make sure that all people are fully allocated over the next two months, and the third month out if possible. If there are people who do not have enough work, make sure that additional work is allocated to them. You should be very sure about the work that everyone is doing this month. However, if you allocate work out three months in the future, some of the numbers will be little more than guesses.
- Communicate with each person so they understand what work is allocated to them over the next few months. They need to understand that the priorities may change, and probably will. However, they can see the best estimate at the time as to what they will be working on for the next three months

### Summary

If your people are allocated to the same work month after month, you do not have to be a good workload manager. This happens if your group does ongoing support, for instance, or if your team is allocated on a long term project. However, most managers need to maintain awareness of the availability of their staff and the backlog of important work.



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There is no excuse for people finishing one assignment and then having downtime because no additional work has been assigned. A good workload planning project forecasts resource availability over the coming three months and maps the available resources against the highest priority work. These priorities may change from month to month, so it is important to replan and revalidate business priorities at least on a monthly basis. This will ensure that people are allocated to the highest priority work on an ongoing basis.