

RESOURCES / USING RESOURCE SCHEDULING IN PROJECT MANAGEMENT

# Using Resource Scheduling in Project Management

Resource scheduling provides a clear path for teams to deliver their best work



Kimberlee Meier

121 11 We're hiring! dated: 29th July 2021

## Table of contents



Resource scheduling is a process in project management that organizes your team's time so that the right person is assigned to each job.

Scheduling resources can be a complicated and time-consuming process, but it's also a crucial piece of the puzzle when it comes to getting projects done.

That's because the very essence of resource scheduling involves organizing your team. Your team is made up of living, breathing people, who work hard, yes, but there are still limitations on how much they can get done in a day. They probably also sometimes like to take holidays and have a life outside the office too!

While some project resources are easy to control (e.g., equipment and facilities), your most valuable resource—your people  — are a little more challenging to organize. Without an effective resource scheduling process, one that takes into account what they're capable of achieving with their time and skills, you risk burning your team out or assigning them tasks they're ill-suited for.

Resource scheduling changes that. It gives team leaders a smarter, more efficient way to assign tasks to their team based on their capability and availability. Not only does this process allow you to monitor a project from start to finish to make sure it goes smoothly, but it also gives project leaders a way to utilize your people so they're working more efficiently.

Let's take a look at what resource scheduling is, why it's important, and how you can use 5 steps to build an effective resource scheduling process.

Let's get scheduling! 

#### **Make the most of your team's time with resource scheduling software**

Rated #1 for [resource management](#) on G2, Float gives you the most accurate view of your team's capacity to plan projects and schedule tasks with confidence.

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## **What is resource scheduling, and why is it important?**

Resource scheduling is a process used by teams to organize and structure their employees so the tasks they need to complete are scheduled based on availability and capability. Using this process, team leaders can allocate and assign people tasks without over (or under) allocating their schedules. In return, team members are always working on an optimized schedule (without

being pushed to their limits), and project managers have greater flexibility

~~Resource scheduling can~~ be used to:

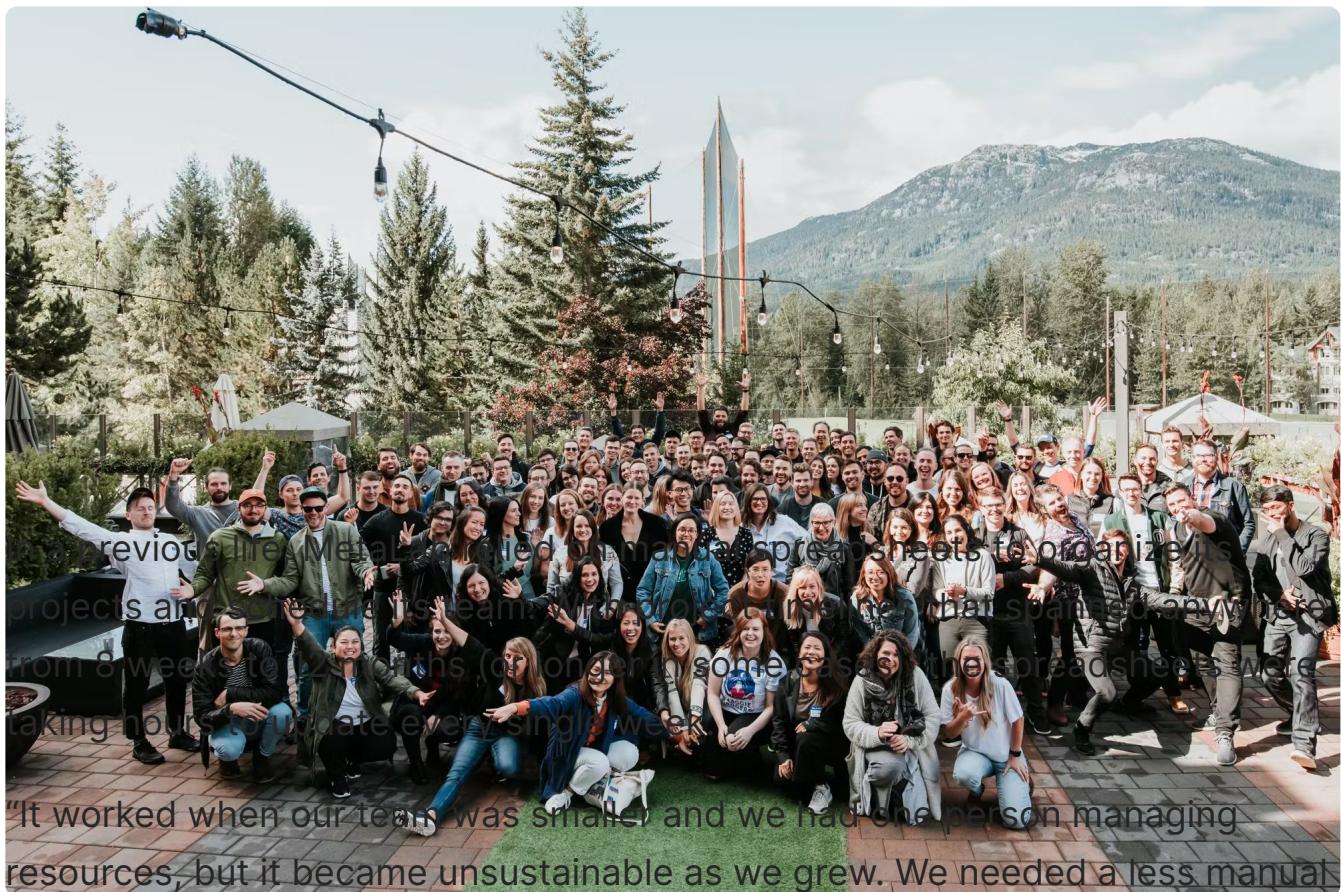
- Assign and monitor projects from start to finish
- Schedule people based on skills and availability
- Assess time delays and speed bumps so you can reshuffle tasks and deadlines to stop a project from going off the rails
- Analyze how well resources are being utilized and reassign tasks to people who are not working to their full utilization rates
- Track project estimations and outcomes to make future scheduling easier

Why is all of this important exactly? 😊

Well, projects have a lot of moving parts. Float's [Global Agency Productivity Report 2020](#) found that 43% of team members say their work is rarely or only sometimes scheduled effectively. On top of that figure, 62% of agency principals say resource scheduling is their biggest project management challenge.

Resource scheduling helps prevent calendar overload within your team and takes the guessing game out of your project lifecycles. It makes it easy to identify who should be working on what, and helps you match people with tasks that they're best suited for. It also gives team leaders a chance to fill gaps in their team's work schedules. If you don't have a designer or engineer on your team to complete a specific task, you'll know ahead of time to hire extra help!

Like many agencies, [MetaLab](#) is constantly trying to find ways for its 150 employees to work more productively—especially as a third of them [work remotely](#) most of the time.



In the previous slide, MetaLab relied on manual spreadsheets to organize its projects and coordinate its team. "We had multiple spreadsheets that spanned anywhere from 8 weeks to 12 months (or longer in some cases), as well as the spreadsheets were taking hours to update every single week."

"It worked when our team was smaller and we had one person managing resources, but it became unsustainable as we grew. We needed a less manual process, better reporting, and the ability to plug in tentative projects in order to look forward at the upcoming months," says Georgia McGillivray, MetaLab Operations Manager.

**The solution?** Resource scheduling software that gave MetaLab's managers a single source of truth for scheduling their projects and people. Using **Float**, MetaLab's operations team now has an accurate view of their team's capacity.

"Our ops team has to know what 100+ different people are doing at any given time. Not only that, but we also have to know what they might be doing two weeks and three months from now."



Raeesa Bhanji, Operations Coordinator

• 150+ people • Fully remote



# Resource scheduling in 5 steps

## Step 1. Break down tasks within a project

The first step to resource scheduling is figuring out what tasks you need to tackle on a project.

Start by looking at the project as a whole, and then breaking down each part into individual tasks. If your agency is auditing and rebranding a company's social media channels, your task list might look like this:

- An audit of all the channels the company is currently using to show traffic and impressions
- Reviewing each channel's assets and branding to make sure they fit within the client's guidelines
- Analyzing competitor social media channels to see what the client is missing
- Updating content across each channel and removing any outdated information
- Setting up advertising, analytics, and tracking on each channel (if the client hasn't already done so)

Once the list is complete you can start to estimate what resources (ahem, people) you'll need to tick them off.

### **Pro-tip: Use time tracking to create accurate estimates for tasks**

Creating accurate estimates for tasks is one of the hardest parts of resource scheduling. That's why time tracking is such a valuable tool. It's an easy, accurate, and reliable way to record how long each task typically takes, and use this data as a reference point for upcoming work.

Find out how you can time tracking can help your team create more accurate resource schedules.

[Learn more](#)

## Step 2. Look at your resource capabilities

Next, confirm who is available to take on tasks.

This step goes beyond just looking at who has space on their calendar for a project. You need to make sure people with space on their calendars also have the skills required to get the work done.

Let's take the earlier example of auditing a client's social media channels. A person on your team might have time to spare on their calendar, but unless they can audit your client's Twitter channel or set up analytics, they won't be able to work on the tasks efficiently. Instead, you should create a schedule around the availability of people on your team who have skills that match the tasks you listed in step 1.

The easiest way to do this is to have a database that tracks the skills of all of your team members so you can quickly match up tasks with their schedules. For example, using [Float](#) for resource scheduling, team leaders can search and filter the schedule based on individual skill tags. If a designer is needed to make sure all of the client's social media branding matches guidelines, all a team leader has to do is type in "design".

Now it's easy to see which designer has room on their calendar to work on the task, and you can assign tasks to the best fit resources.

## Step 3. Schedule tasks to team members based on their availability

Now that you know which tasks need to be worked on and you've verified through capacity planning that your team has the availability to get things done, it's time to start resource scheduling — by assigning tasks to your team based on their availability.

It's important that you have an accurate estimate of how long these tasks will take while you're assigning them. Take a look back at past projects that are similar to the one you are scheduling to get an idea of how long you should allow for each task on your team's calendars.

If you don't have any past data for tasks, don't be afraid to ask your team directly for an estimate.

You: "Erin, how long do you think it will take you to finish an audit on that client's Twitter account?"

Erin: "Around 12 hours, boss."

You: (checks brief) "The client is Kanye West."

Erin: "Woof. Better make it double then."



Now it's time to fill those calendars!

**Hint:** Don't create unrealistic schedules. If they look too full, they probably are. Remember to keep your team's capacity in mind so that they aren't overutilized. Ideally, you should aim to have your team's schedule filled to 80% capacity leaving room time to do other things without feeling overworked. If you need help perfecting your resource utilization rates, follow our [step by step guide here](#).



### Pro tip: Schedule resources based on your team's real capacity

Planning and managing your team's capacity in real time is critical to successful resource scheduling. [Resource management software](#) gives you the most accurate view of everything of your team's availability, [workload](#), and project pipeline, to schedule resources with confidence.

[Try for free](#)

## Step 4. Manage and monitor resources as the project progresses

Alas, your work isn't done once a project kicks off.

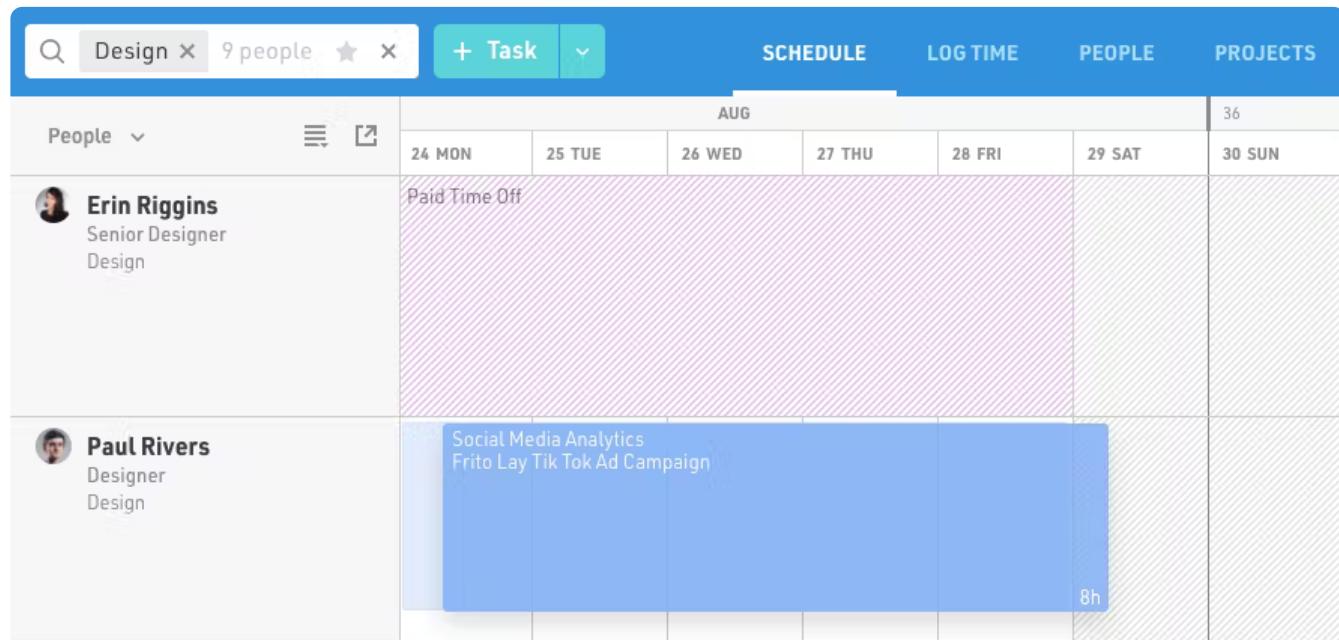
It's crucial to monitor how individual tasks are progressing so your project doesn't get knocked off course. Case in point:

You: "All of the social media channels have been audited. Next week, we're moving on to setting up analytics. Erin, that's on your calendar."

Erin: "I need to take next week off because my baby sister is getting married and I'm on bridezilla duty!"

Yikes. If a team member calls in sick or takes some vacation time, you'll need a plan to reassign their tasks or move their deadlines forward. This is why **resource utilization** is so important. If every creative on your team is working at 100% capacity, there's no room for error.

In Erin's case, she needs to take some time off to attend her sister's wedding. Using Float, a team leader can reassign her task to another social media guru with space by dragging and dropping it onto their calendar. Then, they can block Erin's calendar for the week while she takes time off to celebrate the happy couple.



Drag and drop to reassign tasks to people on your resource schedule

## Step 5. Track the actual time spent on tasks and activities

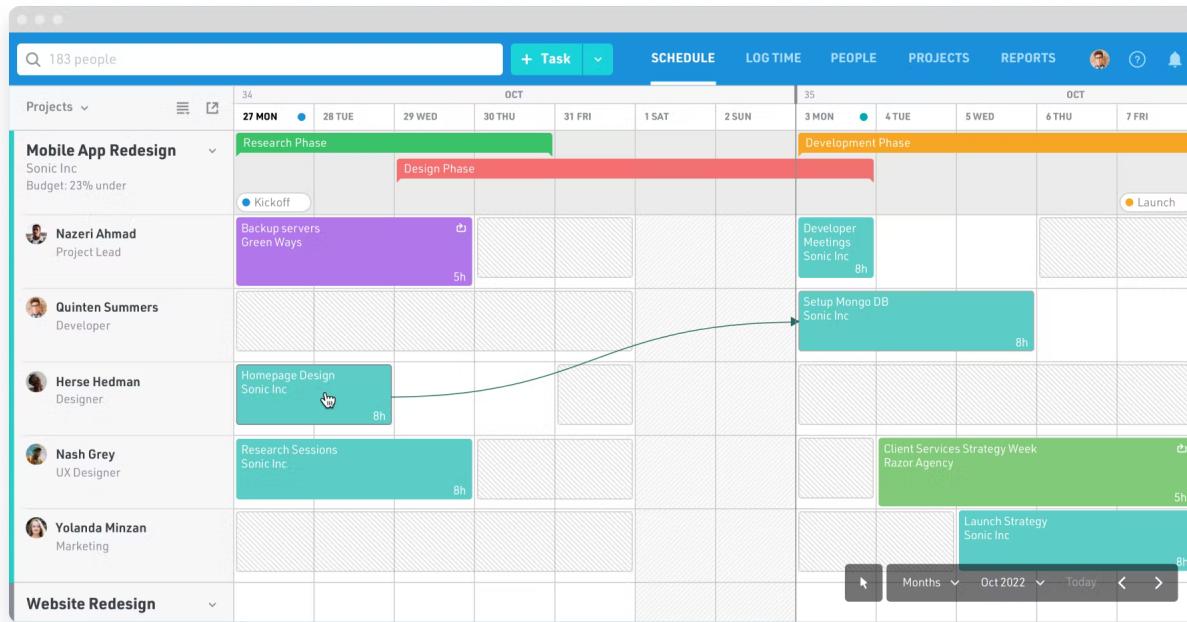
Finally, track everything so you make the project run even smoother.

By tracking how many resources you used on each task, as well as the time it took to complete them, you'll be able to use that data to tighten up your future schedules. Adding **time tracking** to your resource scheduling software is the easiest and most effective way to do this. See if a project task is taking your team longer than expected, or if your resources are being underutilized.

This data can help you course correct along the way, and schedule projects that help your team work more effectively—without burning out.

## Looking for the ultimate resource scheduling tool that combines resource

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