

- 0:03 Hi, good to see you. Thanks for being here. Let's talk about some tips for identifying your project resource needs. I'm Margaret Maloney, off we go.
- 0:13 So here you are, your project has been approved and it's been launched. The charter has been written and approved. This scope has been written and approved. Do you even have your work break down structure? Right on. Now you're ready to jump in and create your schedule. Wait, wait, wait, wait. Not yet. Not yet. Do you know your resource needs?
- 0:38 Now, you might say.
- 0:41 What a dumb question. After all this point in the project the team has been formed, the team members have all been identified. Of course, I know my resource needs, what's wrong with you, Margaret? Okay, maybe so, but it's not gonna hurt you to make sure. It's so much better to ask for and plan for a specific type of resource upfront, as opposed to waiting until you need a resource. And then looking around for help, so let's go back to your project team for a minute. So you say they've all has been identified.
- 1:19 Perfect, It never hurts to reconfirm their participation and availability.
- 1:27 Before you create a schedule and make commitments, I always say, I call it running down the hall. Before you run down the hall and promise something, you're project delivered on a certain date.
- 1:41 You might want to make sure your resources are committed to you.
- 1:45 And if this is a projectized organization then maybe all you need to do is check vacation schedules. What do I mean? Quick, quick review. There's different types of project organizations. When I say a projectized organization, I'm talking about the one where you, as a project manager, you're like the king or the queen. And everyone reports completely to you. And in that instance, you have a lot more control over their availability. And that's why I'm saying maybe you're just checking vacation schedules.
- 2:18 But if you're in a matrix organization, now remember there's a weak, strong, and balanced matrix. And the term weak balanced and strong has to do with the power, balance of power between the project manager and the functional manager. And when I'm saying functional manager, I'm meaning somebody who is a management, manager pardon me of resources. Maybe running like a business unit but isn't particularly a project manager. Okay, if your project is running in a matrix organization, it's a really good idea to pay some visits to those functional managers. The ones that are providing you team members and other resources. And, I'll say confirm, reconfirm, how much participation you get from each team member. And apps for information about vacations, training, other projects. Work that might take them away from you and your project. If you are told you have someone for 50% of their time, find out what that really means, okay? So now you're thinking, duh, it means half of their time. And I say right back to you, does it? Are you sure? 50% of a 40 hour work week, 50% of the time after they handle other responsibilities, it makes a bit difference. Now here I am and I'm speaking as if all of our resources are the human kind and they're not. They're not, the people are very, very important.
- 3:49 We have other resources too. We have equipment. We have materials. We have work space. We have money.
- 3:59 Look at the work to be completed, what does it require? Do you need a test lab? When do you need that lab? How must it be outfitted? What might it, what must it be equipped with?
- 4:13 Or, is your work more virtual yet requiring test data? And what do you need in that test data and how much of it do you need? When do you need it? Who creates it?
- 4:27 Where does the information come from? Does anything need to be signed?
- 4:32 Does data need to go through some kind of a masking process so that we're not using, you know, confidential data in our tests. There's you know, things to think about these are all resources to you and I.
- 4:44 What about equipment? Is there a special piece of equipment that your team needs to use? Is it always

available?

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Maybe, maybe not? When is it available? Is it always calibrated or set up as needed?

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Does it take time to set up this piece of equipment? And for that matter, speaking of equipment setup. There are some pieces of equipment that can only be used for certain periods of time. And then that piece of equipment might need a rest or a cool down period. You see where we're going together with all of this.

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You know with materials, how much lead time does it take for those materials to arrive? Are there constraints? Can they only come from certain locations? Are their challenges in getting certain types of materials versus other types of materials even training should be considered. What if your team members cannot perform a type of work until they receive training? Well then, now we need to think about the training,

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when it's offered, how many people can go at one time. And when they will complete that training and make that, identify that as a resource need. And then it's also a predecessor to some of your tasks on your schedule. So, even though we're not building a schedule yet we know that we have identified training needs to occur, a certain number of people need to go to it. Once they have gone to it, there is some piece of the project work that they are now able to perform.

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Wow, that's a lot of information. How do you know?

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It's true you absolutely may be managing a project where you possess a lot of expertise or you may not.

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Either way, I hope that what you're seeing, you're continuing to see the reason behind all the planning. The reason behind doing such a good job of breaking the work down and taking your work breakdown structure to as detailed a level as makes sense. Is that when you've done this and you've really done your planning work, you can look. And you can have informed discussions with your team members about what it takes to complete each piece of work.

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If the pieces of work aren't identified, you may or may not get to the level of conversation and level of planning that identifies. That three weeks into the project, you need the test lab and you need it for four days and it has to be set up in a certain way.

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So for some of the work, consider asking your team members to walk you through the steps, not every little single thing or you'll drive em nuts. But for some of the areas of the project where maybe the work is different or new or more complex.

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Ask the team to walk you through these steps and at each step work with them to identify what is needed to complete that step. This is also gonna accomplish something else, so an extra bonus thing that this is going to accomplish. It's gonna help with some cross training too, so that others who are listening who maybe are going to do that job or do part of that job, they will begin to understand what is expected as well.

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Why go to all of that detail, you're killing me Margaret, why go to all that detail?

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It's less expensive and less embarrassing to find out you need something before you start than it is to be in the middle of the work and realize something is missing.

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You don't need to hear your sponsor look at you and say, why didn't you think of that earlier?

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And those are some tips for your project resource identification.

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Thanks for being here, wishing you continued success, bye for now.