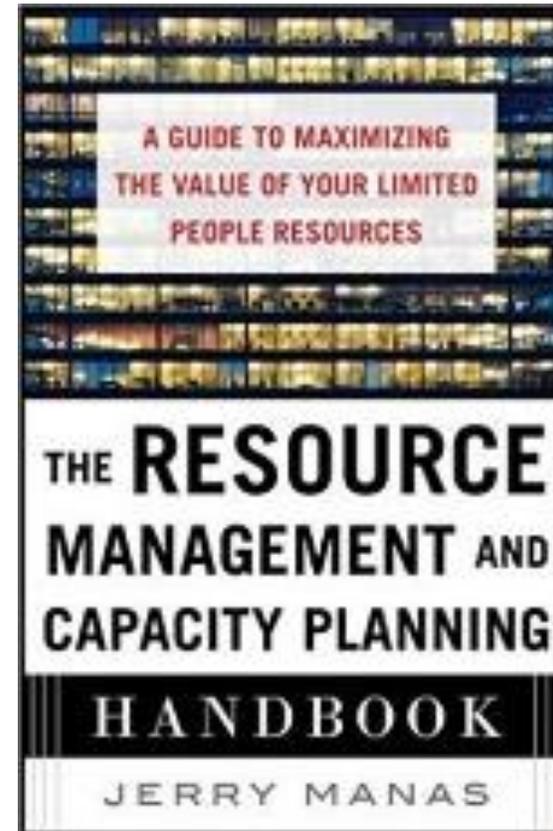


# 10 Proven Military Strategies for Breakthrough Resource Management

Jerry Manas, Author, “The Resource  
Management and Capacity Planning Handbook”



## Why Military Lessons?

Nowhere is there a richer source of strategies and tactics for **how to apply limited human resources** than in military history.



# What If You Could Learn:

How to **gain speed and agility** by limiting demand to a more manageable size and prioritizing better



# What If You Could Learn:

How to **protect your resources** from being over-booked, over-used, and burnt out



# What If You Could Learn:

**Why multitasking and “divide and conquer” often backfire**



# What If You Could Learn:

What to do when business units are  
**all clamoring for the same resources**



# What If You Could Learn:

How to “**do more with less,**” and what to do when you’ve truly reached your limit



# Two Thousand+ Years of Resource Strategy

- **Sun Tzu** (500 BC) – “The Art of War” - 13 Principles
- The **36 Strategems of Ancient China** (500 BC)
- **Alexander the Great** (326-323 BC)
- **The Roman Empire** (27 BC – 1453 AD)
- **Napoleon** (1769-1821) – 115 Maxims
- **Carl Von Clausewitz** – “On War”
- **U.S. Armed Forces** – 9 Principles of War

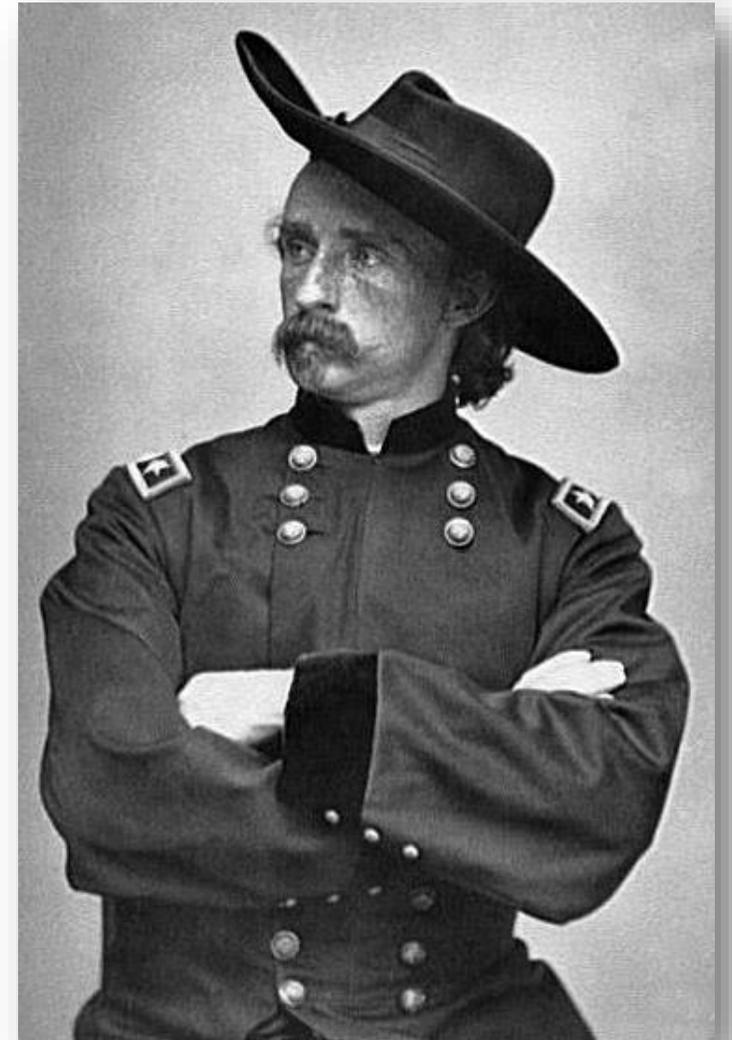


# Case Study: Custer's Last Stand

June, 1876 – Soon after the U.S. Civil War

**Lt. Col. George Custer** had a mission in the Black Hills of South Dakota

It didn't go well



Side Note: This is the Same Area  
Rocky Raccoon Lived

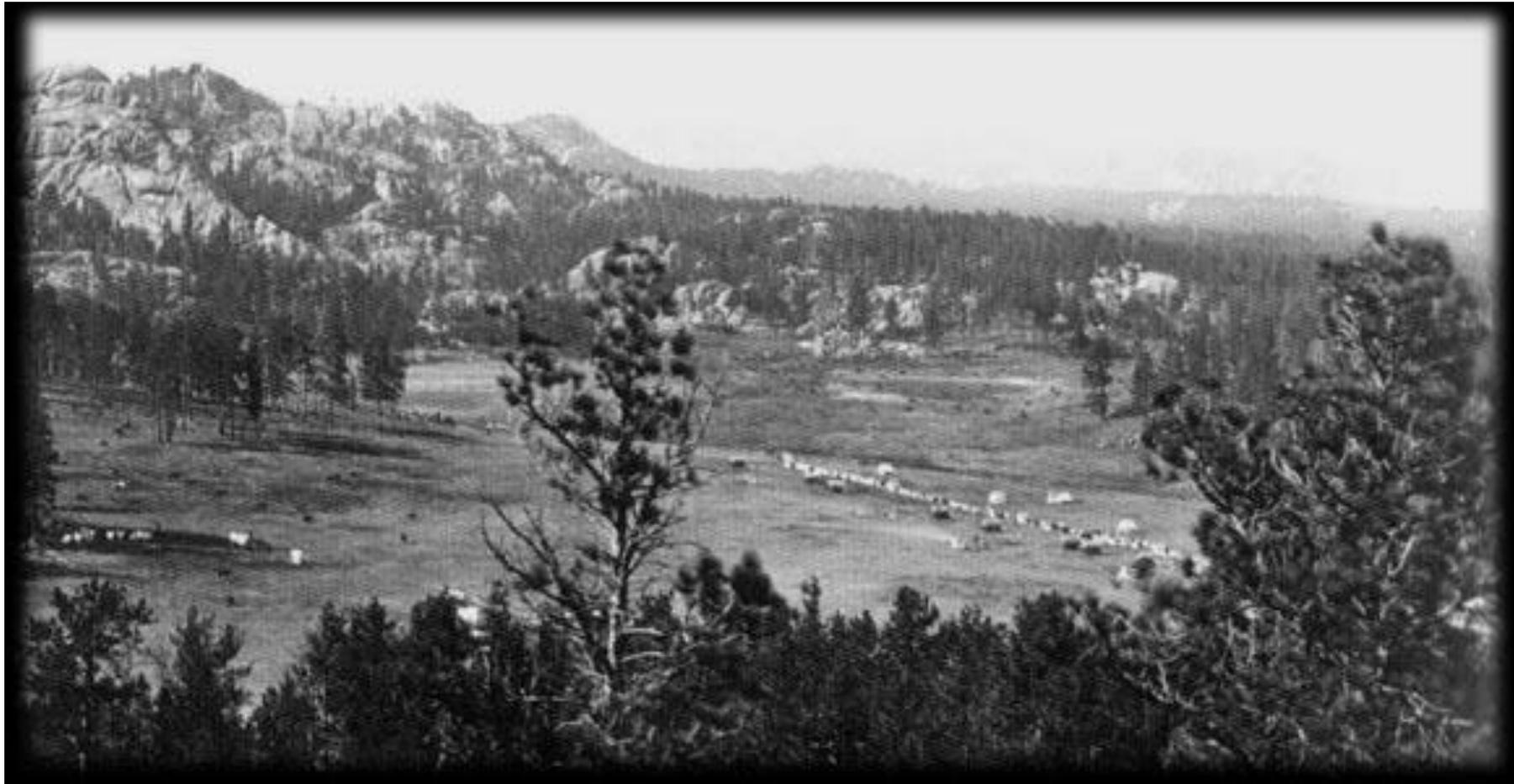


# Custer's Mission

- **7th Cavalry Regiment:** ~700 men
- **Mission:** Force the Native American tribes off the gold-rich land and establish an army base.



**ALERT!** “Territory well-defended by Sioux and Cheyenne tribes. Wait for reinforcements.”



# Battle of Little Bighorn (A River in Montana)

- Sitting Bull had convinced all the warring tribes to unite.
- Combined tribes number 10,000+
- Custer leads his small army full speed ahead, split into 3 units.
- Result: 268 men dead (including Custer and his entire unit). 55 injured.



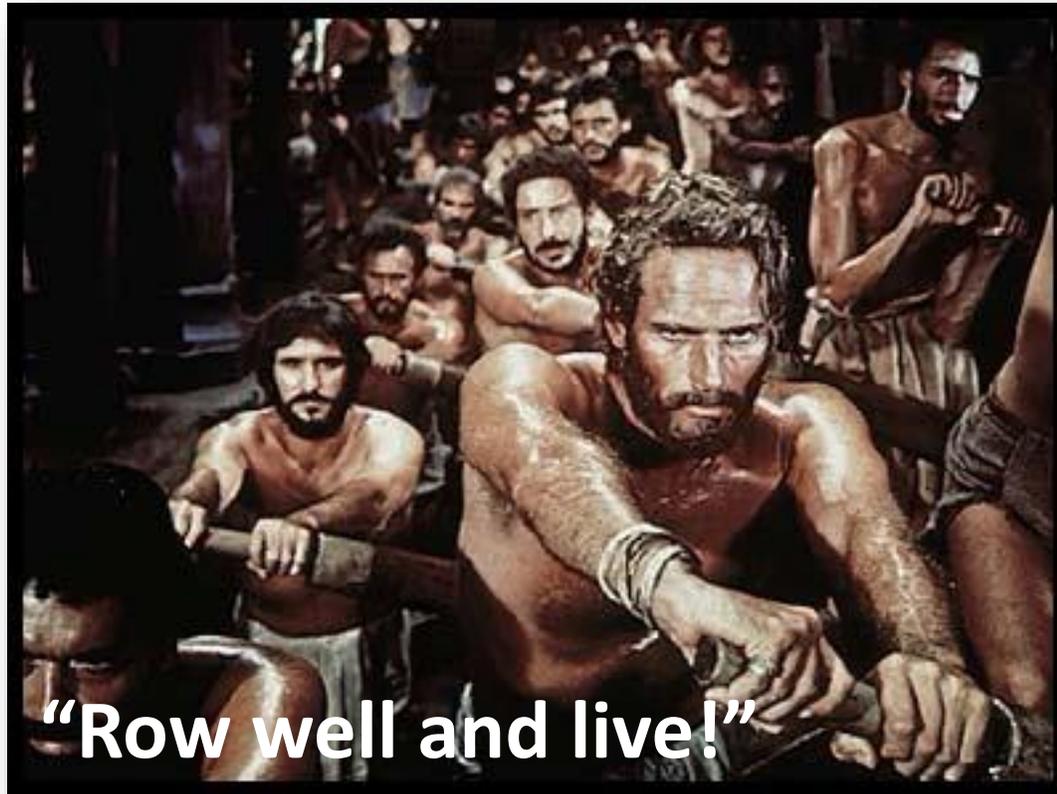
# Resource Lessons from Custer's Last Stand

- Know what you're up against
- Don't divide your own forces into too many efforts, or you risk each one failing
- Do the work when you have the resources to succeed
- Know the difference between boldness and stupidity; Don't burn people out.



**Bonus Lesson: Be like Sitting Bull. Unite everyone for a common cause.**

# A Perennial Problem: Constrained, Overwhelmed Resources



# The Ongoing Search for a Solution



“It’s Too Complex!”

# The Resource Planning Summit

Emergencies

Stakeholders

Competitors



Keep the Lights on

Strategic Projects

Conflicting Business Unit Goals

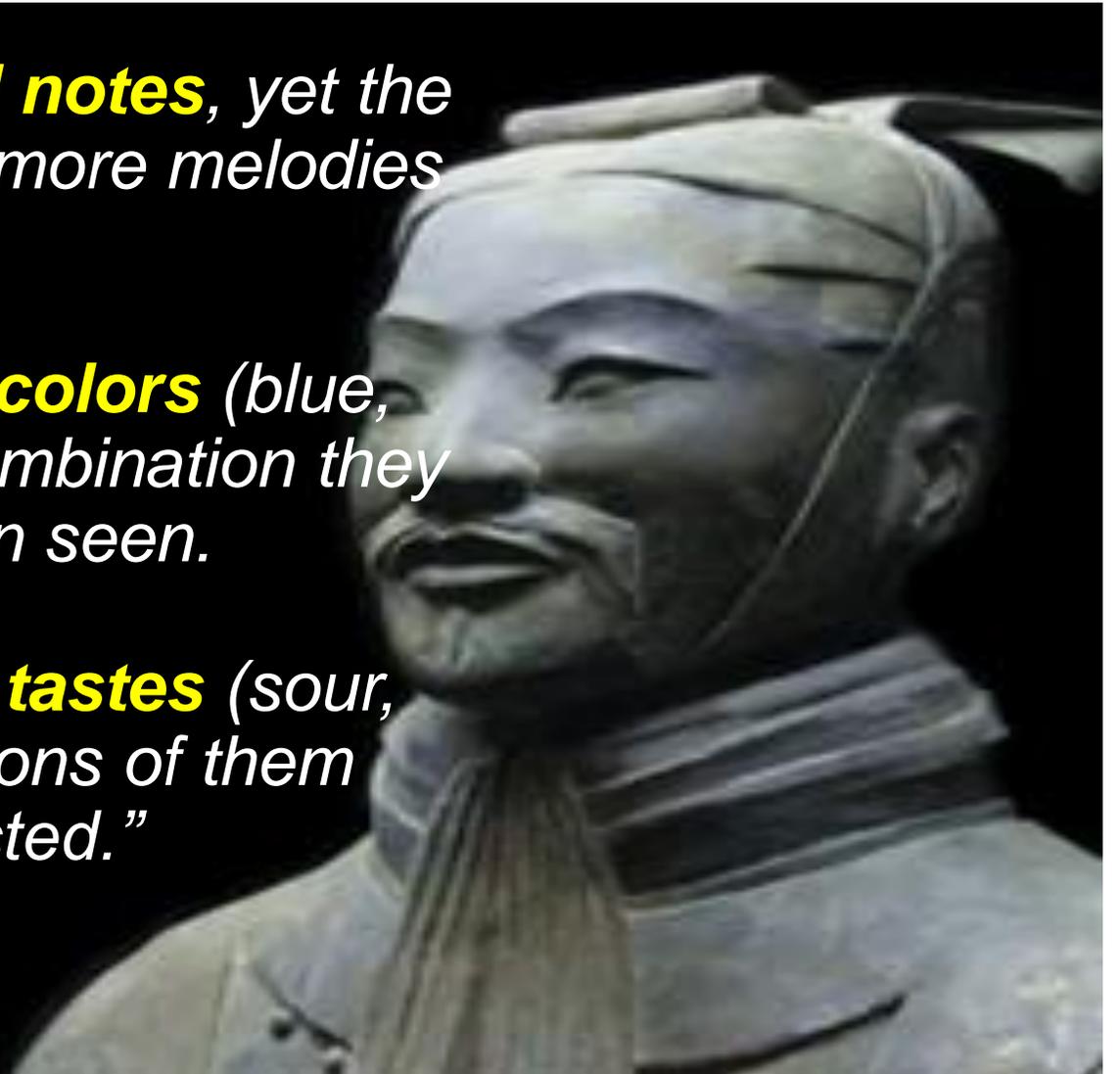
# Complex Systems Have Simple Roots

*“There are not more than **five musical notes**, yet the combinations of these five give rise to more melodies than can ever be heard.*

*There are not more than **five primary colors** (blue, yellow, red, white, and black), yet in combination they produce more hues than can ever been seen.*

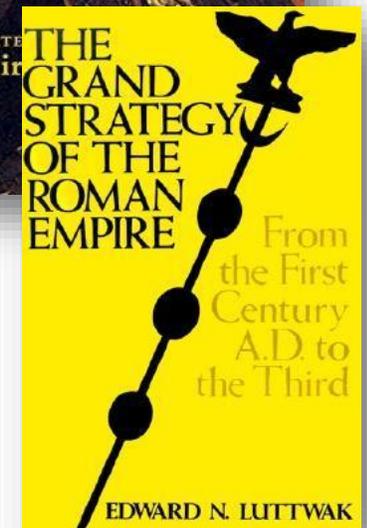
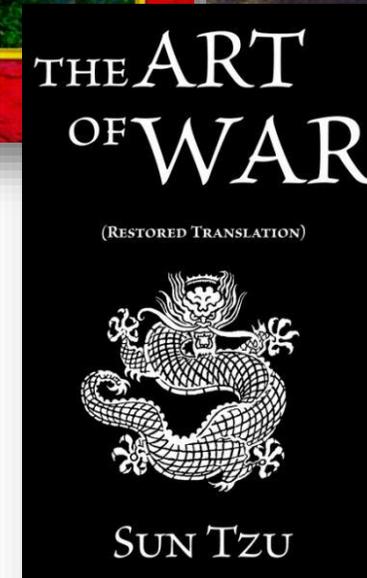
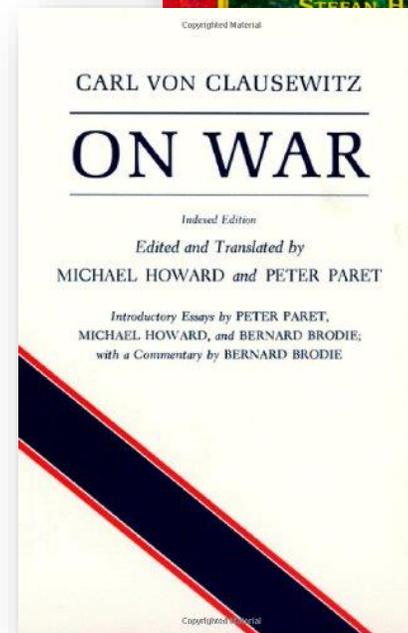
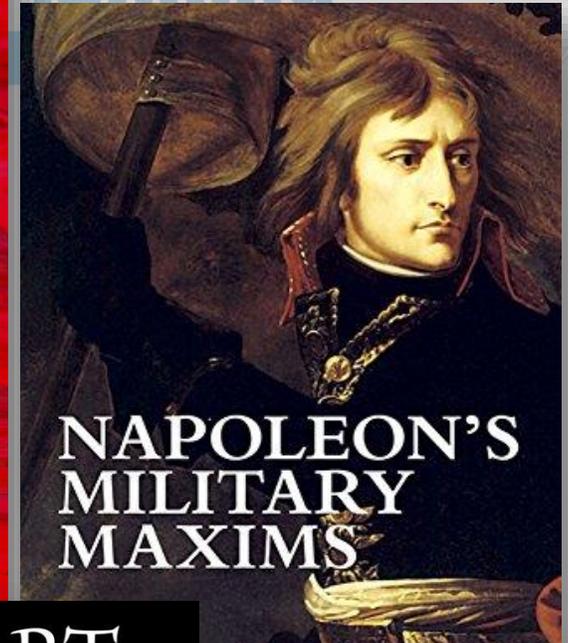
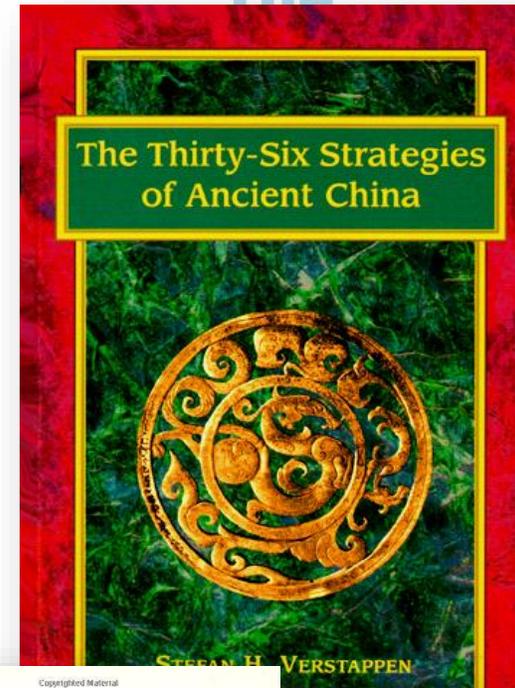
*There are not more than **five cardinal tastes** (sour, acrid, salt, sweet, bitter), yet combinations of them yield more flavors than can ever be tasted.”*

*- Sun Tzu (500 BC)*





- Systems thinking / CAS
- Metaphor for the universe
- Generating/Overcoming
- Yin/Yang
- Medicine, Philosophy, Cooking, Martial Arts, Astrology, Fengshui

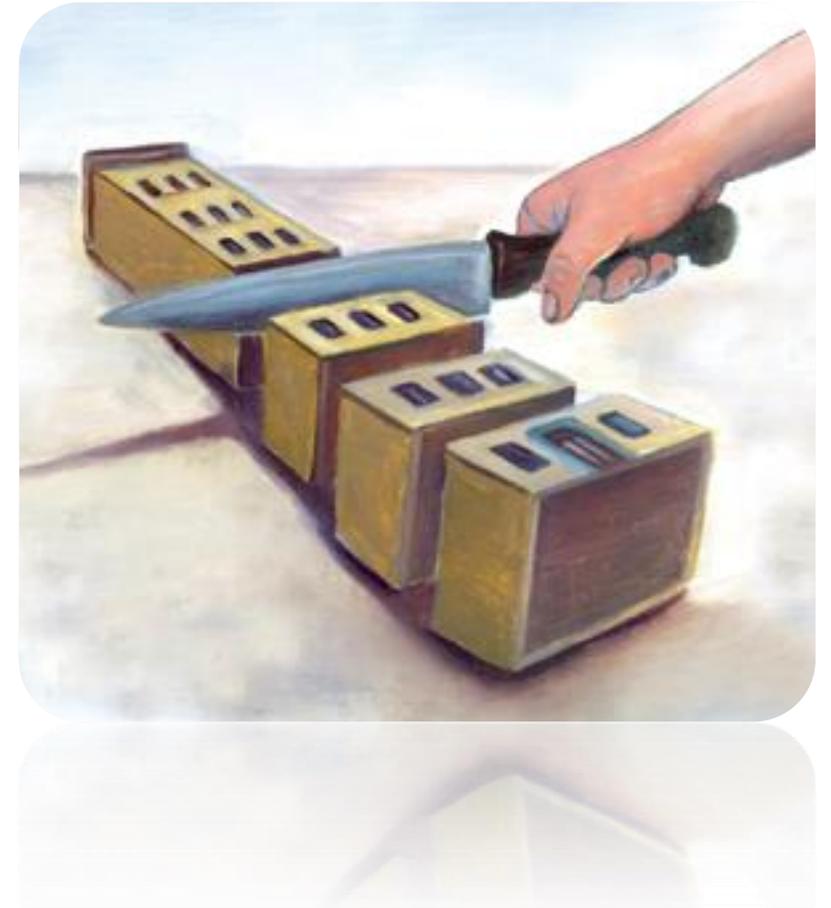


# 10 Simple and Timeless Strategies for Resource Management

1. Divide and Conquer
2. Concentration of Force
3. Economy of Force
4. Raiding
5. Fortification
6. Delay
7. Reinforcements
8. Allies
9. Unity of Command
10. Retreat

# Strategy 1: Divide and Conquer

- Definition: Gaining an advantage by encouraging dissent within the enemy, thus **dividing their forces**
- Often mistakenly interpreted as dividing **your own** forces by multitasking (under the guise of “teamwork”)
- Instead, make the enemy (the work) smaller!



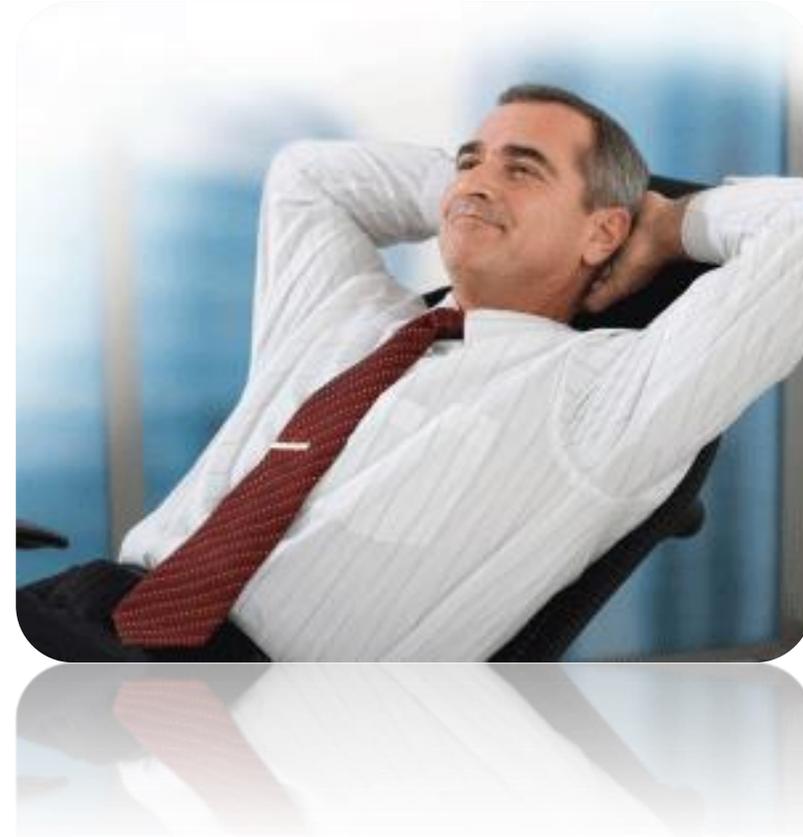


What About a Smaller Shark?



# Ways to “Shrink the Demand Shark”

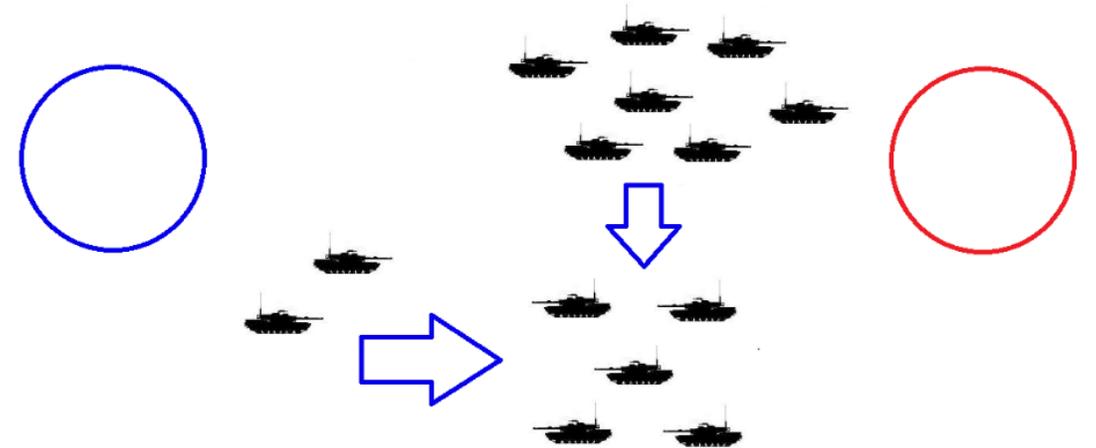
- Fewer projects / Better prioritization & filters
- Reduced/Deferred scope
- Phased/staggered initiatives



**Be More Purposeful**

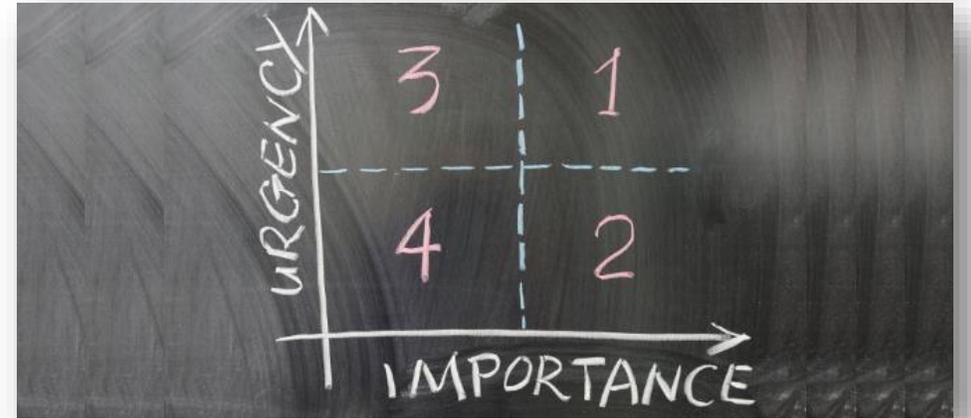
## Strategy 2: Concentration of Force

- Definition: Applying an overwhelming number of forces toward a strategic portion of the opposing force.



## In the Business World...

- Apply a majority of resources to your primary objectives
- Use an **importance/urgency matrix** to first tackle work that's urgent and important, then schedule work that's important but not urgent.
- Remember: Focus increases throughput; multitasking does not.



**Food for thought: What makes something high priority? What is value?**

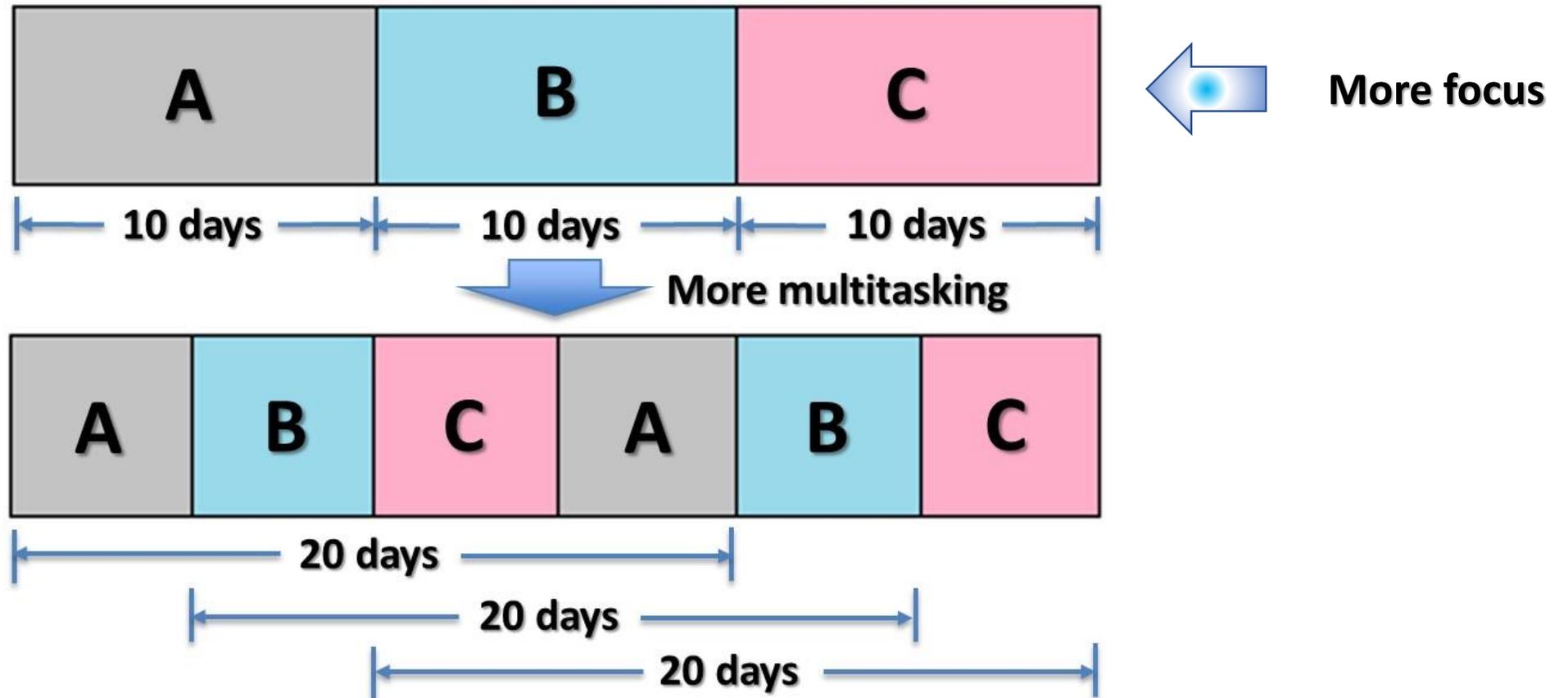
# Multitasking is Worse Than Marijuana

“Researchers at the Institute of Psychiatry at the University of London studied 1,100 workers at a British company and found that multitasking... **caused a greater decrease in IQ than smoking pot or losing a night’s sleep.**”

- Forbes, June 2014

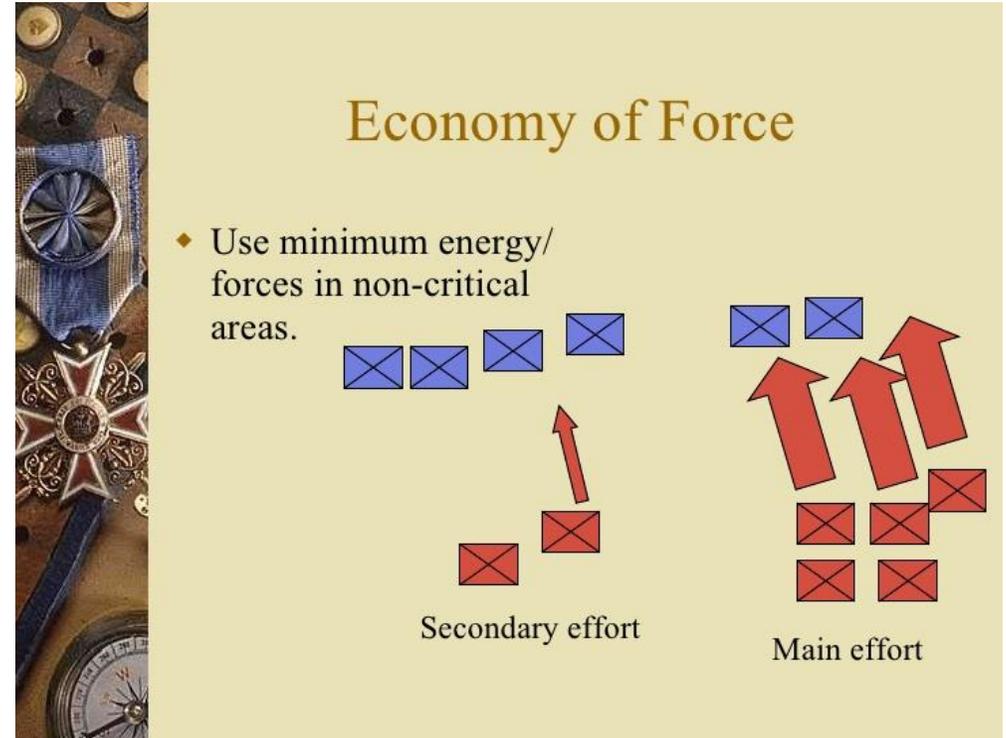


# The Myth of “The Sooner We Start, the Sooner We Finish”



## Strategy 3: Economy of Force

- Apply a *maximum effective amount* of resources to primary objectives
- Apply a *minimum effective amount* of resources to secondary objectives
- Use reserves strategically; don't waste them



# Primary and Secondary Objectives

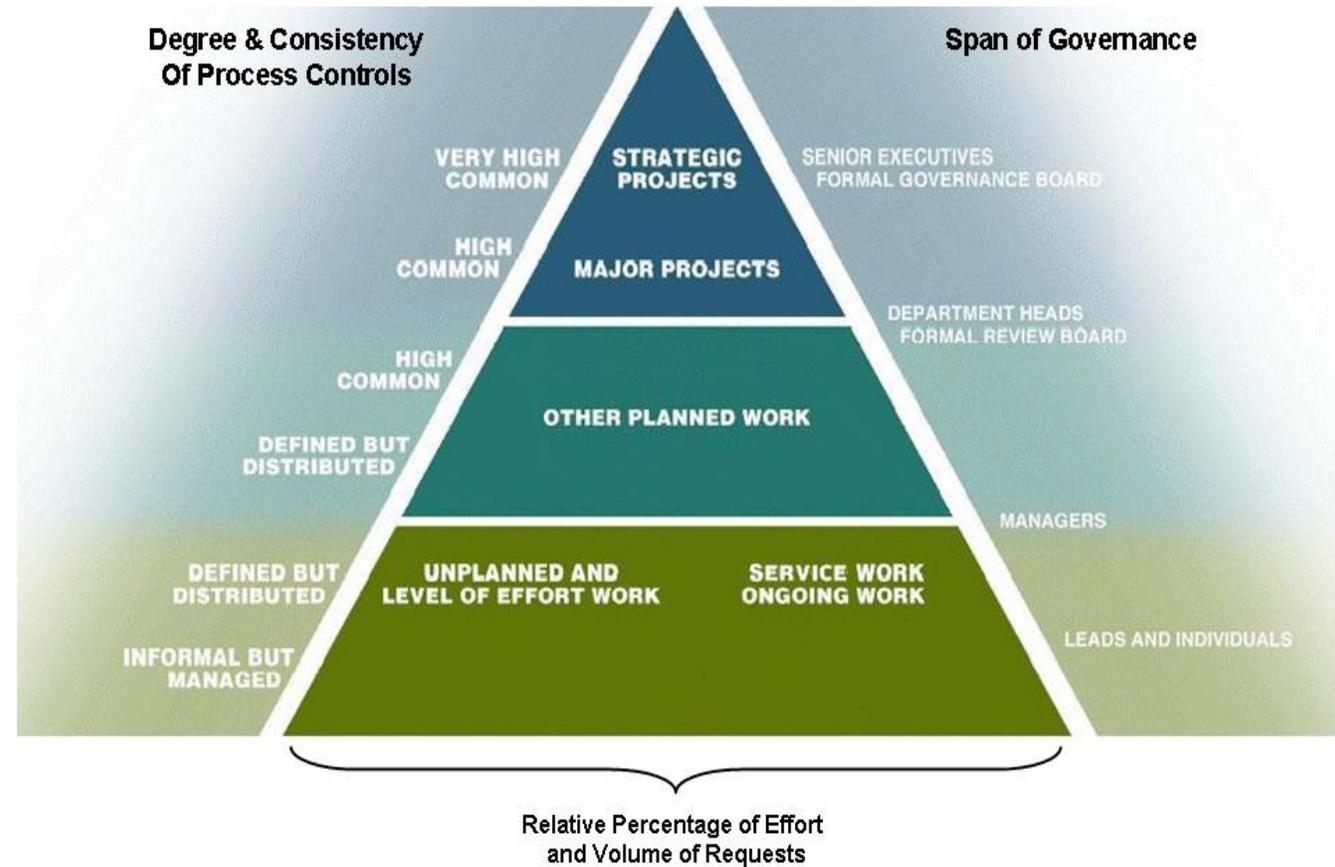


Image source: "Taming Change with Portfolio Management" (Durbin, Doerscher)

# Case Study: Napoleon, Battle of Ulm

Primary Objective: Stop the Austrians from reaching France.  
Secondary: Keep the Italian forces from joining them.

- Adapt to change by redirecting resources
- Focus on high priority work
- Minimal effort to secondary priorities
- Innovate for advantage!



Making better use of your resources than the other guys

“The moral is to the physical  
as two is to one.”

- Napoleon



Don't underestimate the human aspect of resource optimization!

## Strategy 4: Raiding

- Definition: Making the enemy weaker by raiding their supplies or provisions.
- In business, “raid” the demand workload by:
  - killing projects
  - tightening intake filters
  - prioritizing better



## Strategy 5: Fortification

- Armies build forts to protect themselves.
- In business, we must protect our resources' availability.
- We do this by gaining visibility of their workload and protecting against overbooking.  
*(Resource Managers are in the best position to do this!)*



# Protect Your Resources from Overbooking

## RESOURCE AVAILABILITY

- Projects
- Small Efforts
- Base Services
- Unplanned Work
- Time Off



## ALTERNATE SOURCING

- Roles
- Resource Type/Skills
- Outsource/FTE

**FORTIFY!!!**

## Strategy 6: Delay

- Delay a portion of the enemy's troops so you can focus your attention on the primary objective.
- Identify projects that can be delayed until you have the resources to undertake them.
- Optionally, assign preliminary legwork on the efforts while you focus the bulk of your resources on immediate needs.



# Case Study: Napoleon at Waterloo



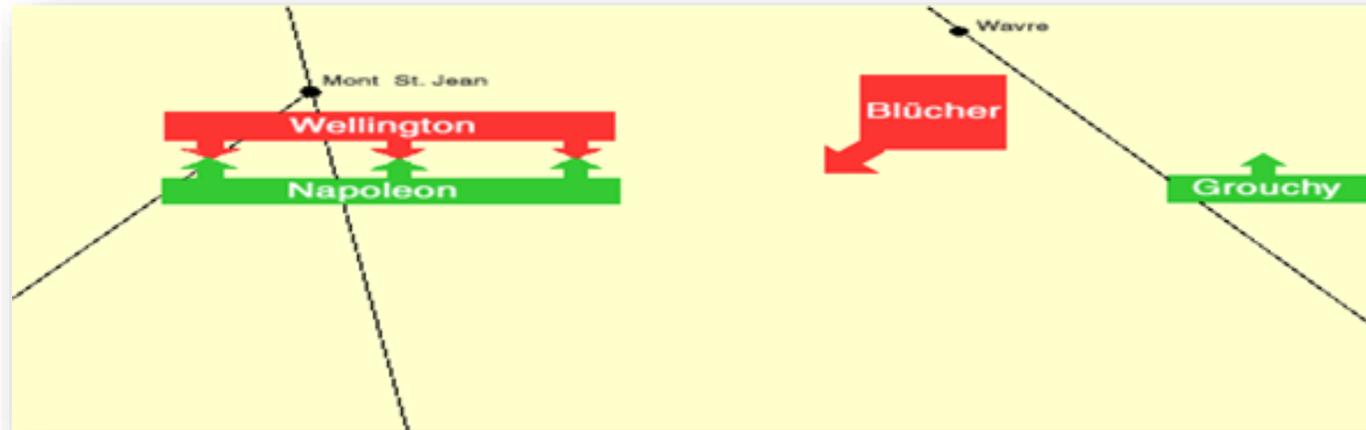
Early Morning

Ref: <http://carol.nuvox.net/dolphin//waterloo/>

Copyright 2000, David Lawrence

# A Great Strategy, But it Failed Due to One Vital Error...

3:00pm



6:00pm



Grouchy delayed himself instead of the enemy!

Ref: <http://carol.nuvox.net/dolphin//waterloo/>

Copyright 2000, David Lawrence

No e-mail! No cell phone!

## Some Bonus Lessons from Waterloo

- Put the right people in the right jobs
- Don't burn out your people
- Communicate any barriers to meeting objectives!



## Strategy 7: Reinforcements

- Bringing in additional resources, supplies, or capabilities to increase strength against difficult odds.
- In business, this can be people, training, tools, or skills.
- Beware! More people can mean increased cost and risk



**KEEP  
CALM  
THE  
REINFORCEMENTS  
HAVE ARRIVED**

# When in Doubt, Bring in Dragons



## Strategy 8: Allies

- Leverage the strength of others to gain an advantage
- In business, allies can include stakeholders, suppliers, customers, consultants, internal champions, and more
- BUT... be sure they're aligned and committed
- Standards, ground rules, and good relationships help



# Strategy 9: Unity of Command

- Ensure a single source of accountability and unity of leadership
- Beware of conflicting objectives and agendas
- Get stakeholders aligned on priorities, especially regarding shared resources
- Have a clear process for tie-breaker decisions



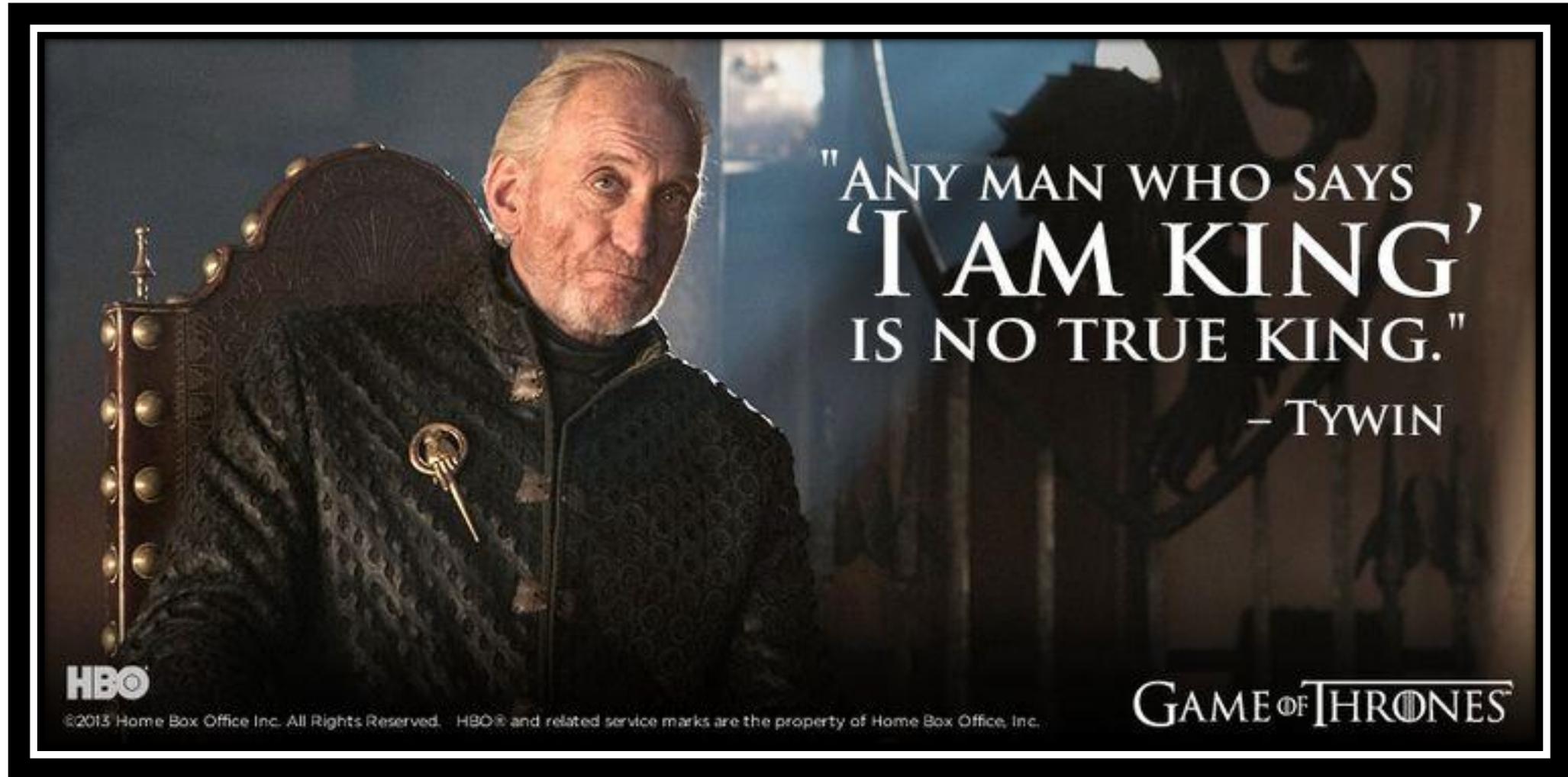
Warning!  
Conflicting  
directive. Does  
not compute.

“It is better to have one  
bad general than two  
good ones.”

- Napoleon



# That Does NOT Mean Being a Dictator



## Strategy 10: Retreat

- The 36<sup>th</sup> Strategy of Ancient China: “When all else fails, retreat.”
- Don’t walk into a “Death March” project.\*
- Don’t be afraid to kill projects that no longer bring value.
- Sunk cost is a poor indicator of future value.



\* Ref: Ed Yourdon, *Death March*, (Prentice Hall, 1997)

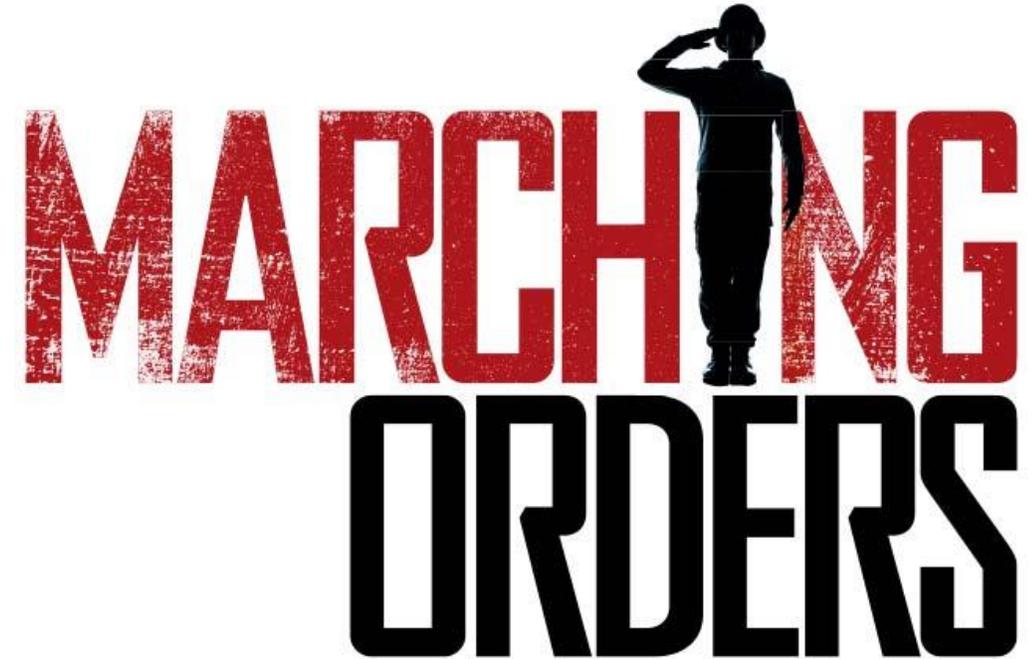
# The 5 Root Strategies

1. **Weaken the enemy** (the demand)
2. **Strengthen yourself** (through allies, alternate staffing, tools, training, alignment, innovation, and inspiration)
3. **Employ your forces strategically**
4. **Have a strong defense** (capacity planning, resource management)
5. **If all else fails, retreat**



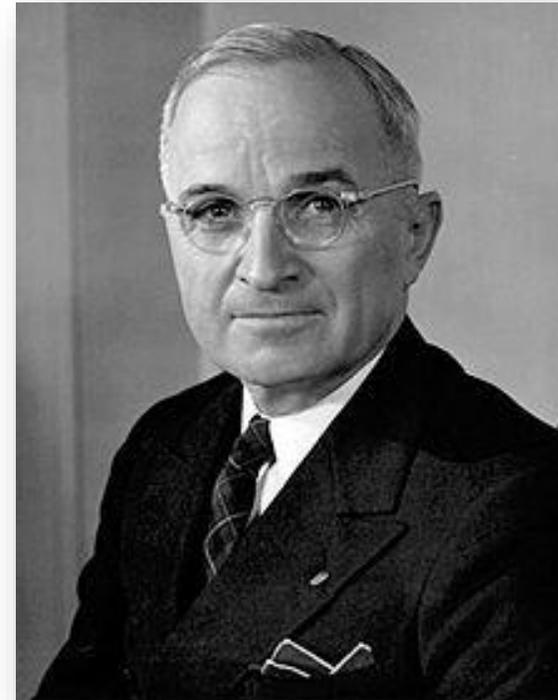
# Final Marching Orders

1. Don't be like Custer; make sure you scout the terrain and plan for adequate resources
2. Divide and conquer the work; not your own team (like Custer and Napoleon's marshal at Waterloo did)
3. Invest in an intake and prioritization process; focus on high value innovation & sustaining work
4. Gain visibility into your resources' full workload to avoid overbooking
5. Institute ongoing capacity and skills planning
6. Provide adequate training, skills, and tools for maximum productivity
7. Ensure leadership is aligned, objectives are clear, and allies are on board



“There is nothing new in this world except the history you do not know.”

- Harry S. Truman

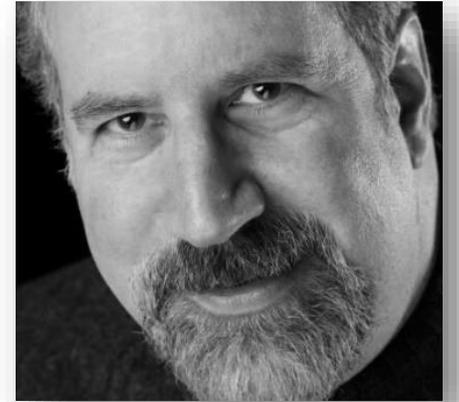


# QUESTIONS???

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- Topics: Leadership, Organizational Project & Resource Management, Lessons from History

