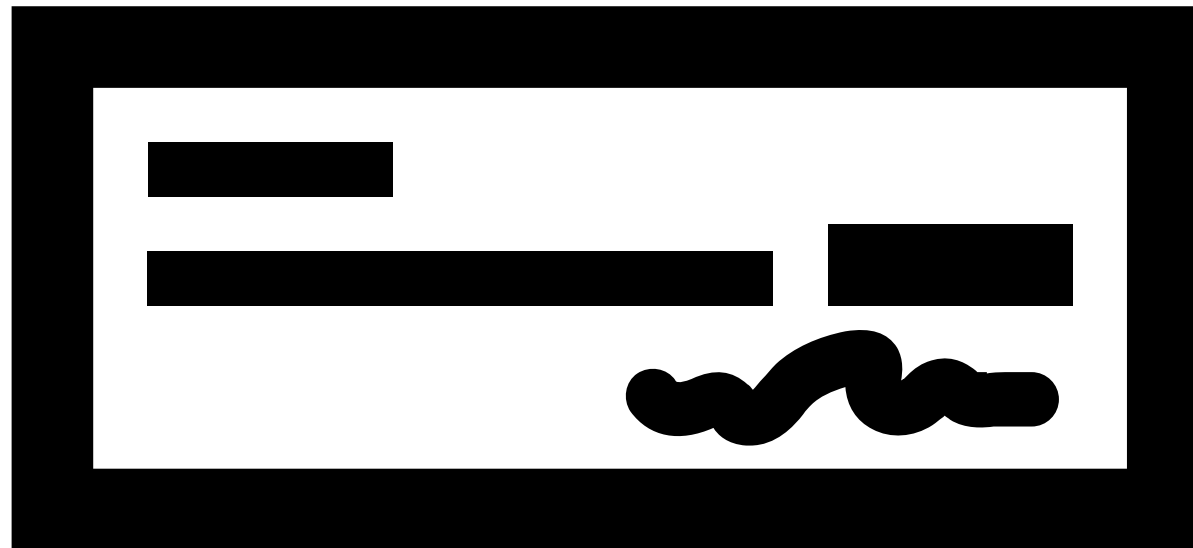


Building and Maintaining Effective Forecasts

MayAnn Severud, ITILv3 and Molly Wilde, RMCP®
Consultants, Upsher-Smith Laboratories, LLC

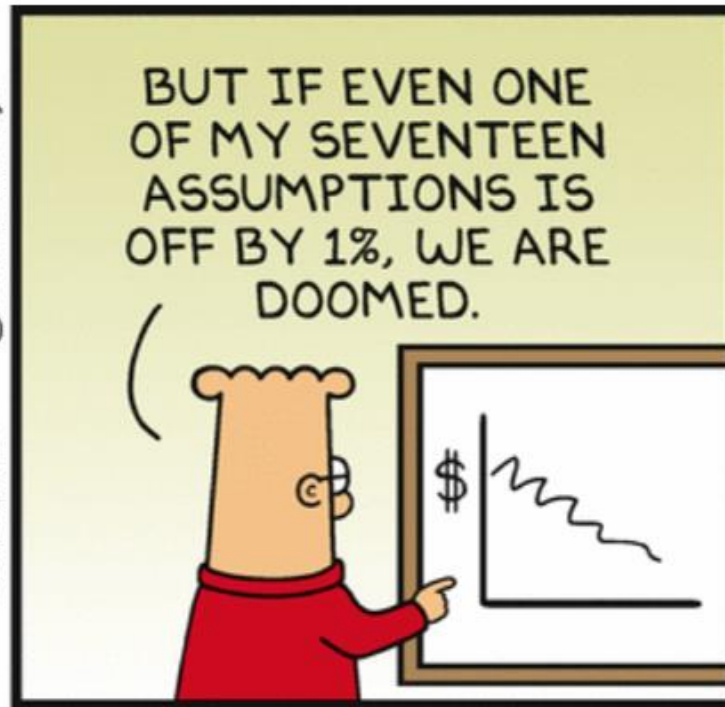
Why Forecast Matters



Thursday November 30, 2017 *If We Are Off By One Percent*



@ScottAdamsSays



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<https://dilbert.com/strip/2017-11-30>

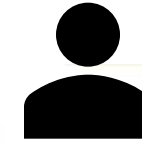
Build and Maintain Effective Forecast

1. Implement Strong **Demand Intake Filters**
2. Leverage **Forecast Templates**
3. Consider **Full Scope of Demand**
4. Maintain Interlock **Framework**
5. Make **Decisions**

Demand Intake Filters



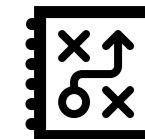
1. Project Discovery/
Business Case



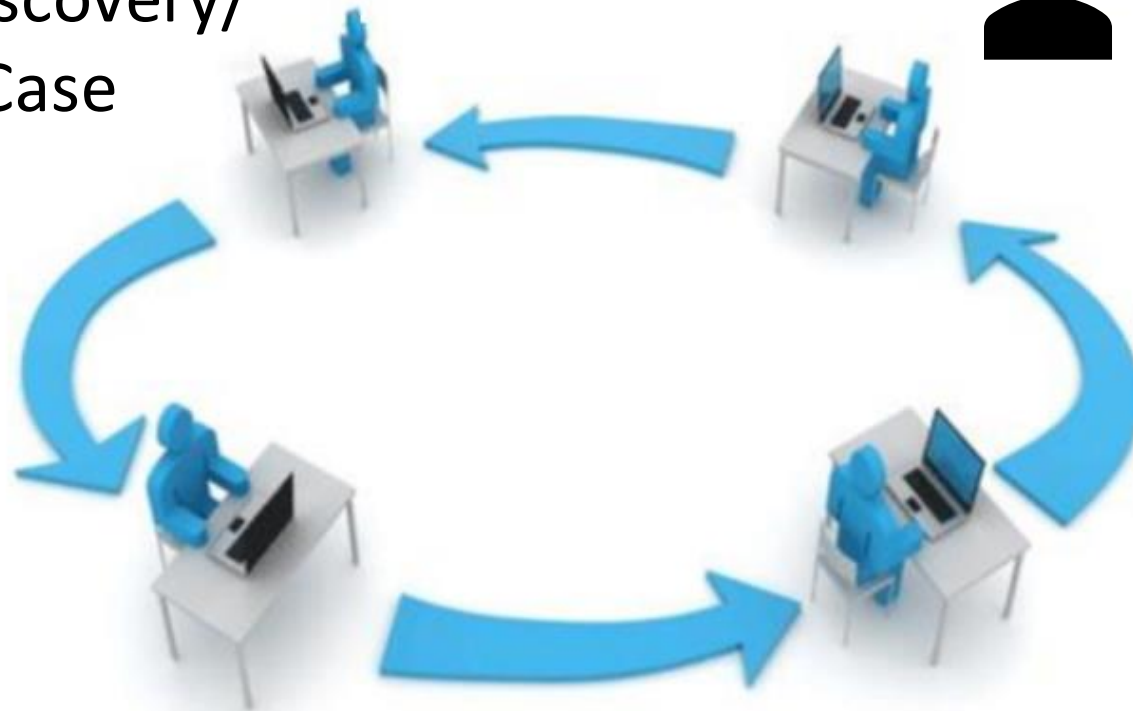
4. Assign Resource/
Maintain Forecast



2. Prioritize/Schedule
Project



3. Plan Project/
Request Skills



Adapted from PDWare™ Explorer –Webinar Series
Demand Management

Build and Maintain Effective Forecast

1. Implement Strong **Demand Intake Filters**
2. Leverage **Forecast Templates**

Forecast Templates

Definition: Model that directionally predicts resource requirements to deliver a project (skill, FTE, duration)

Forecast Template Value

1. First **fast** estimate required for capacity modelling
2. Improves **accuracy** of resource forecast
3. Improves **predictability** of required resource skills

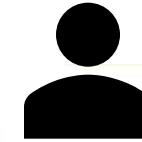
Forecast Template Example

		Concept	Design		Testing	Readiness	Launch
Org	Skill	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6
Team A	PM	.8	.5	.5	.5	.4	.3
Team B	Eng	.8	.8	.8	.5	.1	.1
Team C	QA	.1	.1	.5	.5	.2	
Team D	Reg	.1			.5	.3	
Team E	Ops	.1			.8	.8	.8

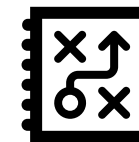
Demand Intake Filters



1. Project Discovery/
Business Case



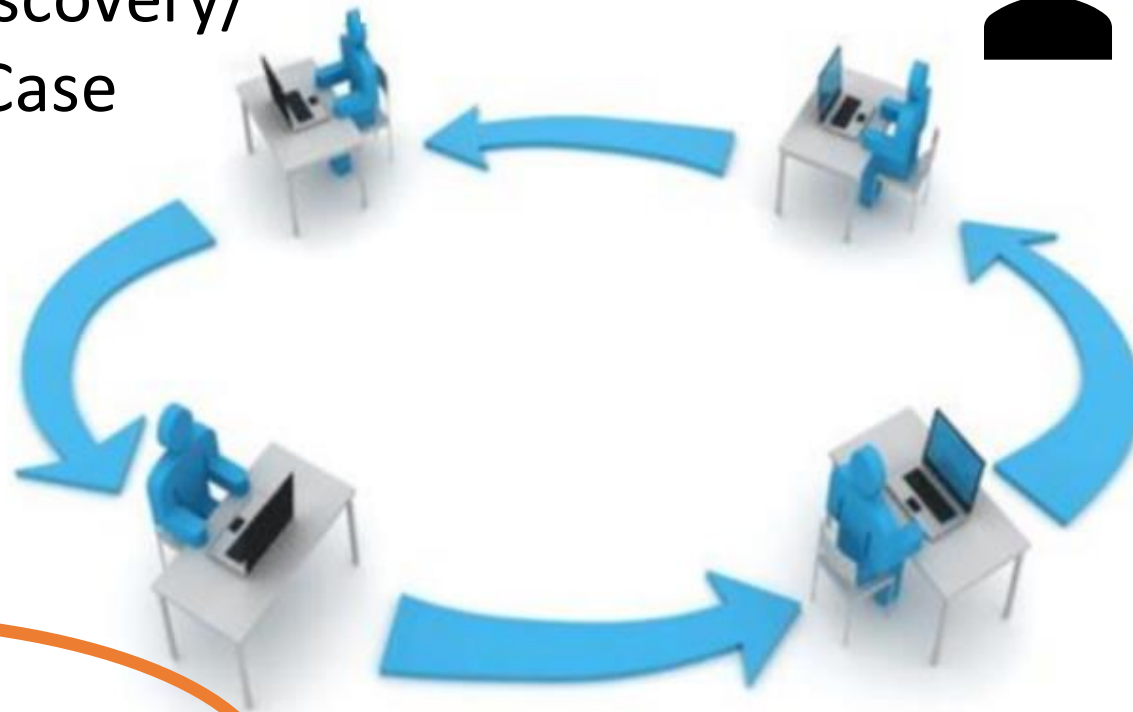
4. Assign Resource/
Maintain Forecast



3. Plan Project/
Request Skills



2. Prioritize/Schedule
Project

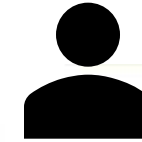


Adapted from PDWare™ Explorer –Webinar Series
Demand Management

Demand Intake Filters



1. Project Discovery/
Business Case



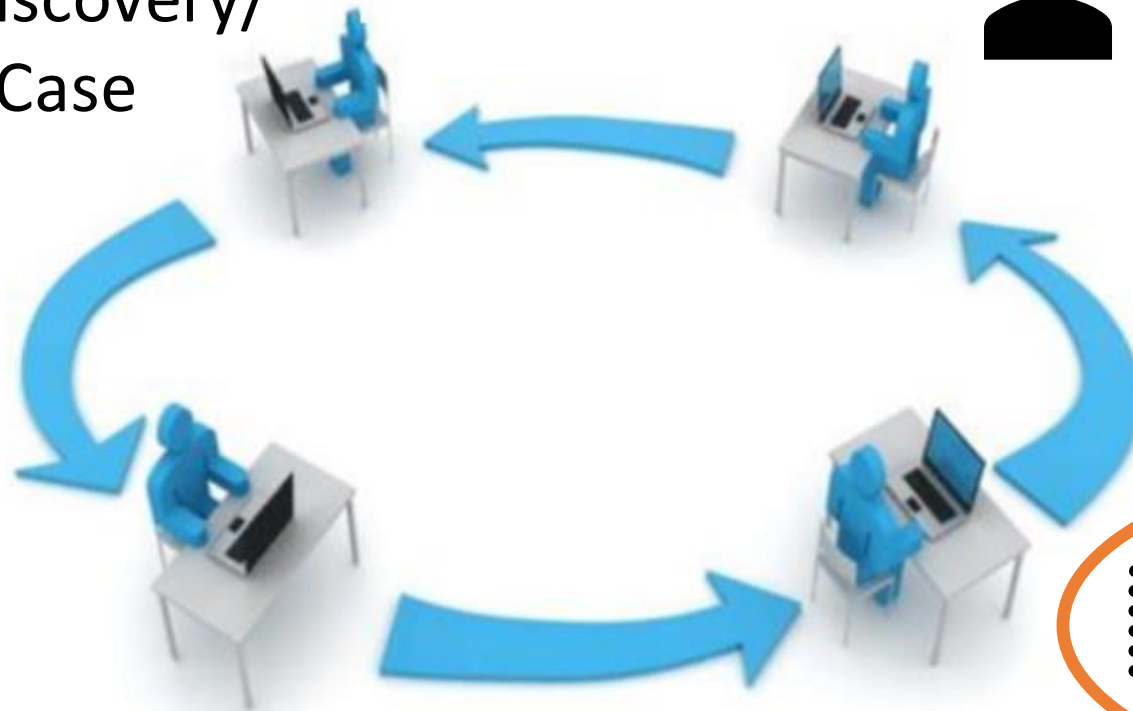
4. Assign Resource/
Maintain Forecast



2. Prioritize/Schedule
Project (Use Forecast Template)



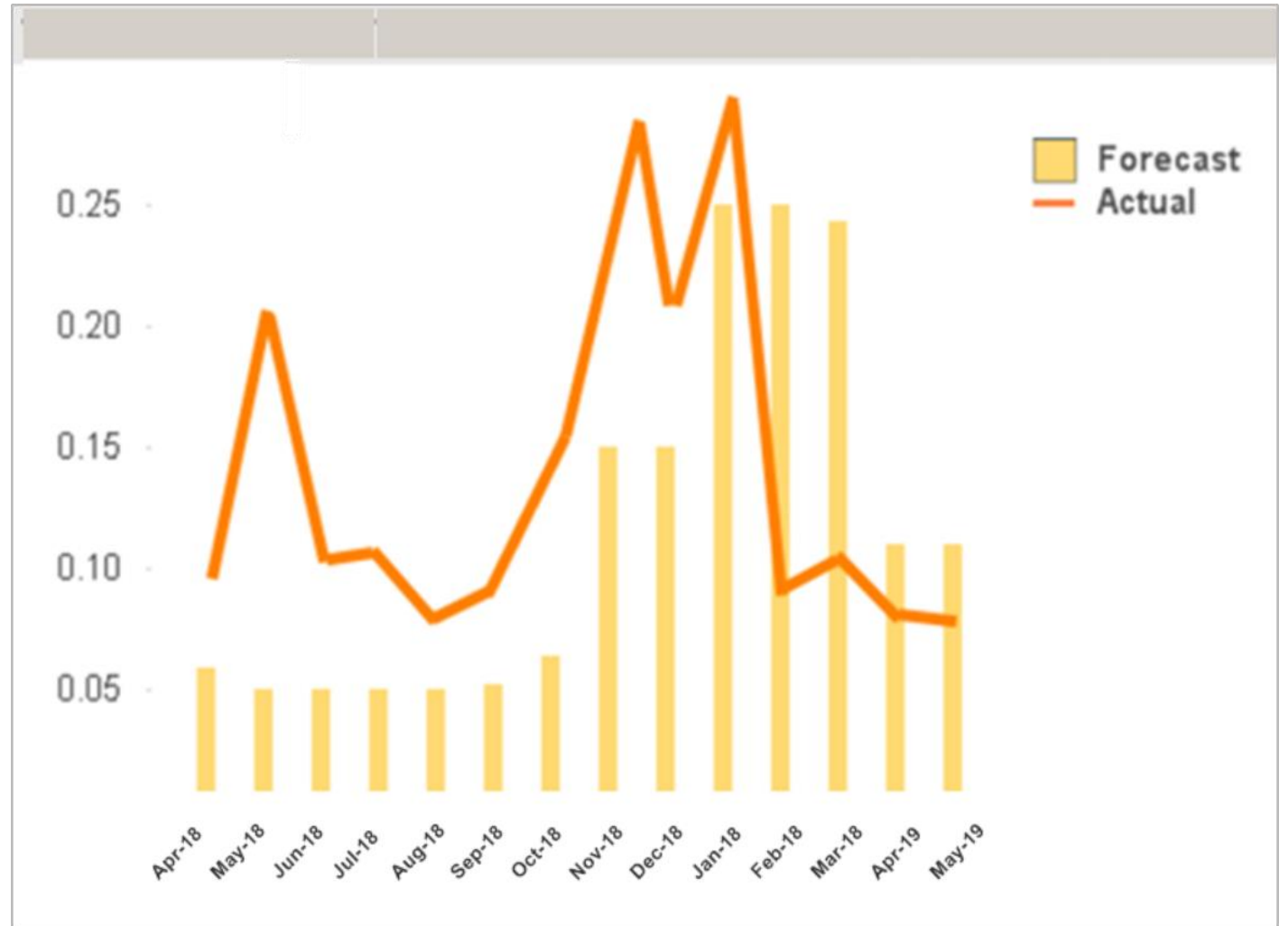
3. Plan Project/
Request Skills



Validation: Aggregate



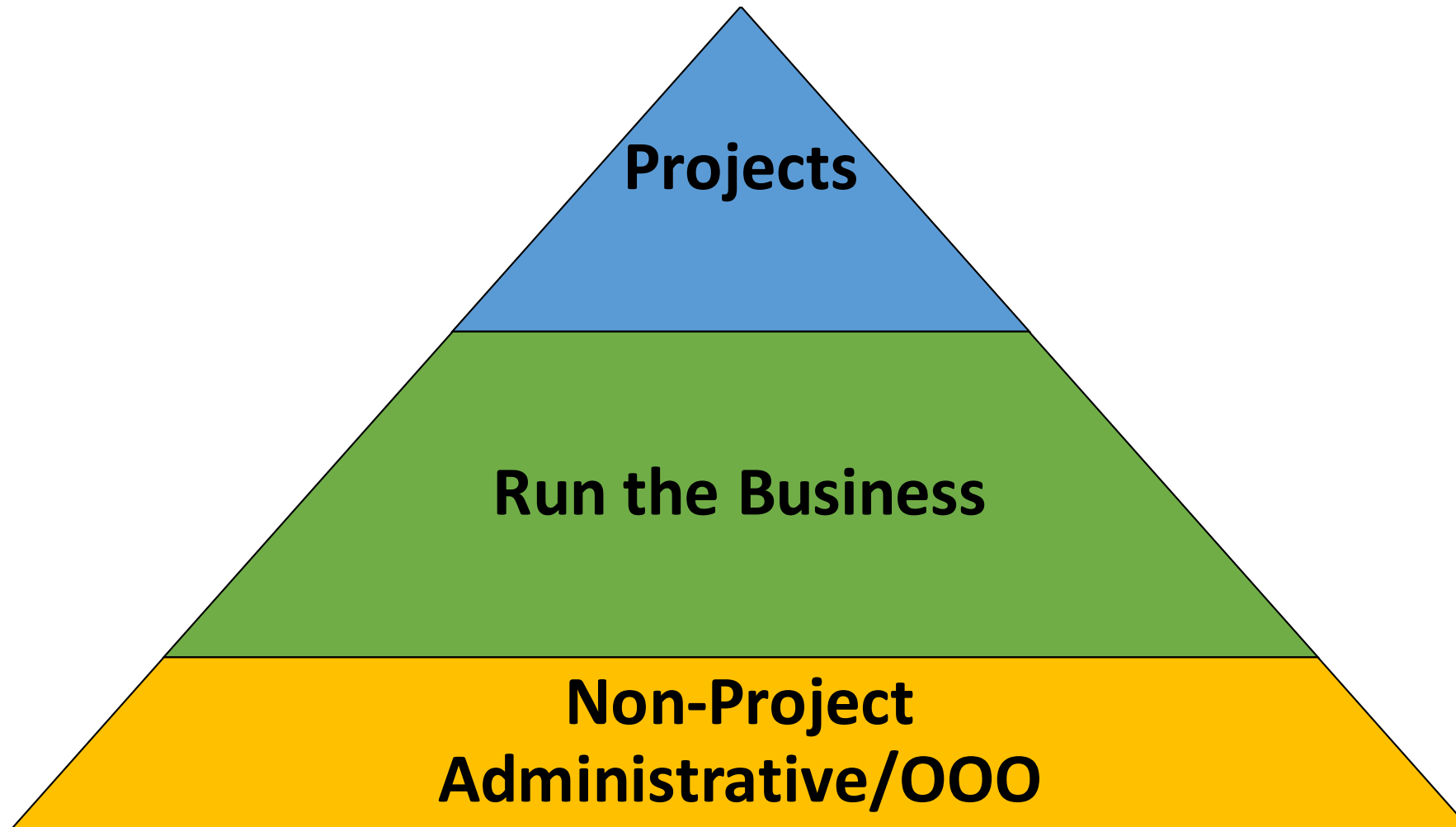
Validation: Time



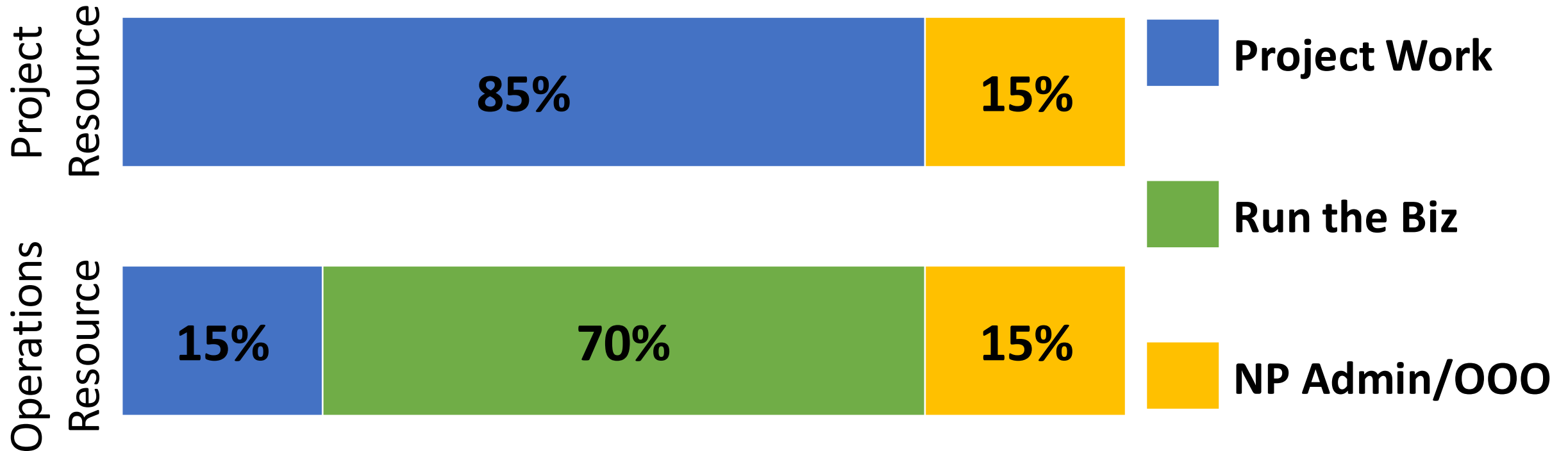
Build and Maintain Effective Forecast

1. Implement Strong **Demand Intake Filters**
2. Leverage **Forecast Templates**
3. Consider **Full Scope of Demand**

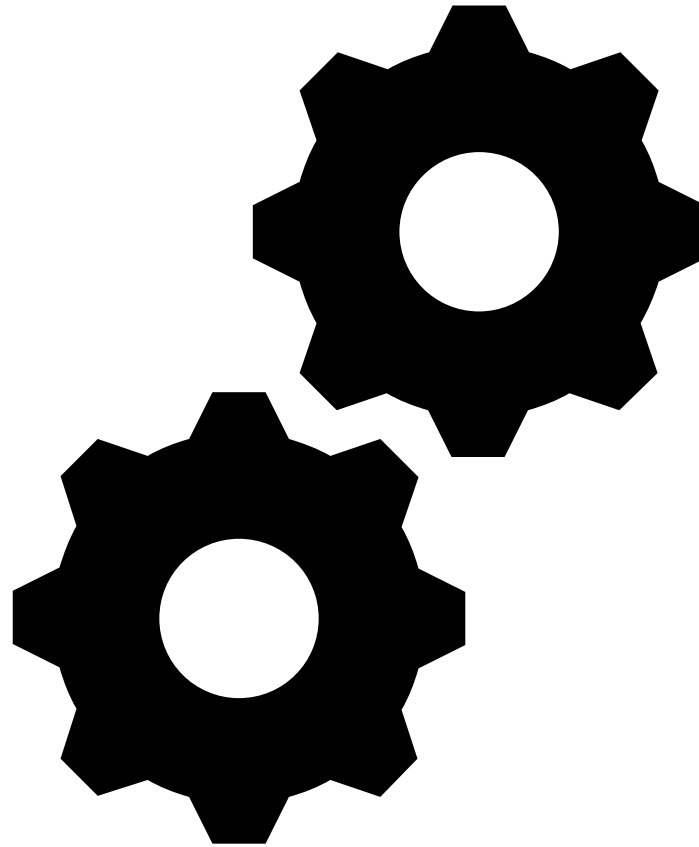
Consider Full Scope of Demand



Utilization Targets



Systems Orientation



Build and Maintain Effective Forecast

1. Implement Strong **Demand Intake Filters**
2. Leverage **Forecast Templates**
3. Consider **Full Scope of Demand**
4. Maintain Interlock **Framework**

Maintain Interlock Framework

Definition: The concept of forecast interlock is the process by which related stakeholders agree on all the drivers of demand, future capacity, and the ‘interlock’ or overlap between them

Resource Management Institute, (2014 – 2019) Resource Management Certified Professional (RMCP)[®] certification course workbook

Maintain Interlock Framework

Strategic

Tactical

Annual Interlock

Establishes the initial baseline

Combines inflight & growth projection

Capacity needs at skill level

12-18 months

Quarterly Interlock

Review plan & track for deviations

Review project priority and status

Sign on resources monthly demand

1-3 months

Tactical Checkpoints

Identify significant changes

Coordinate proposed roll outs

Identify resources in conflict

1-3 months

Baseline Interlock

Skill	Mo 1	Mo 2	Mo 3	Mo 4	Mo 5	Mo 6	Mo 7	Mo 8	Mo 9
Project Manager									
Mechanical Eng				-1.0	-1.0	-1.5	-2.0	-2.0	-1.5
Electrical Eng									
QA Specialist									
Regulatory		+1.0			+1.0	+2.0	+3.0		

Maintain Interlock Framework

Strategic

Tactical

Quarterly Interlock

The living plan &
basis for decisions

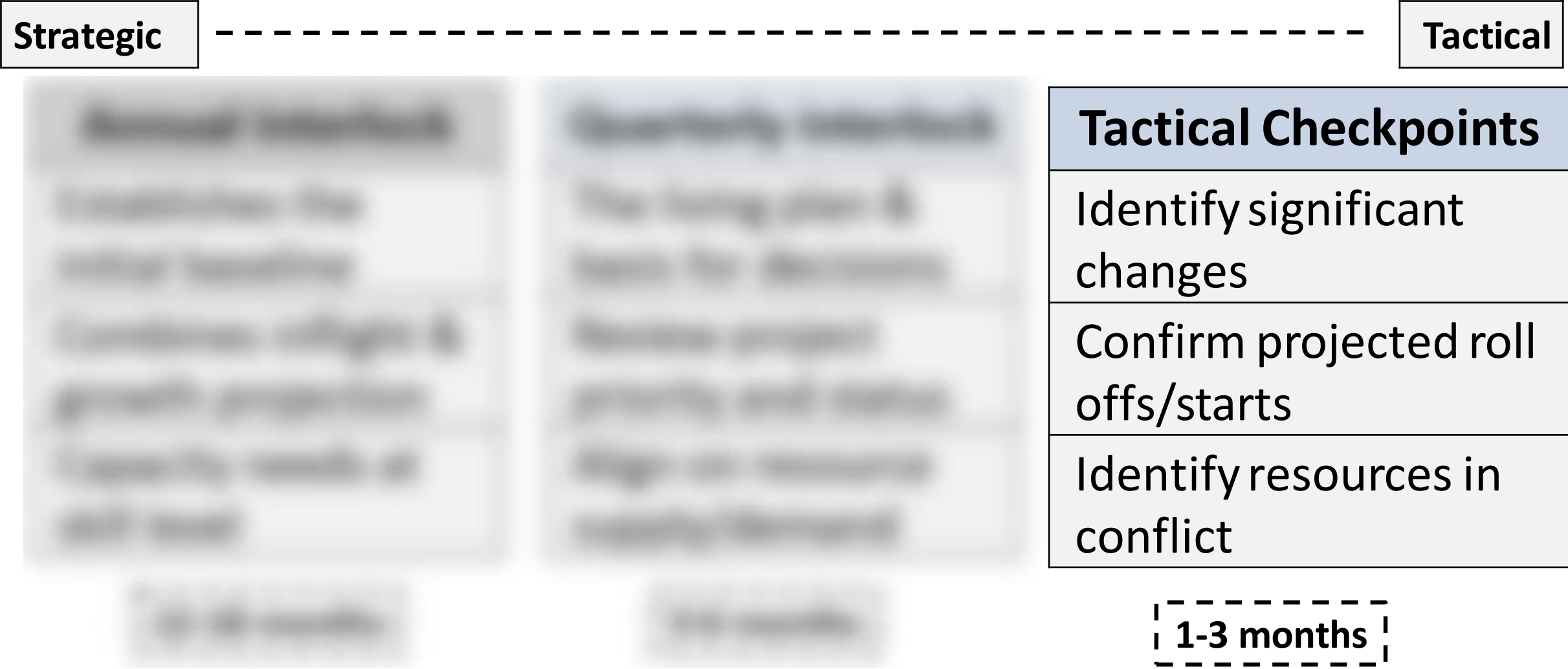
Review project
priority and status

Align on resource
supply/demand

3-6 months



Maintain Interlock Framework



Checkpoint Example

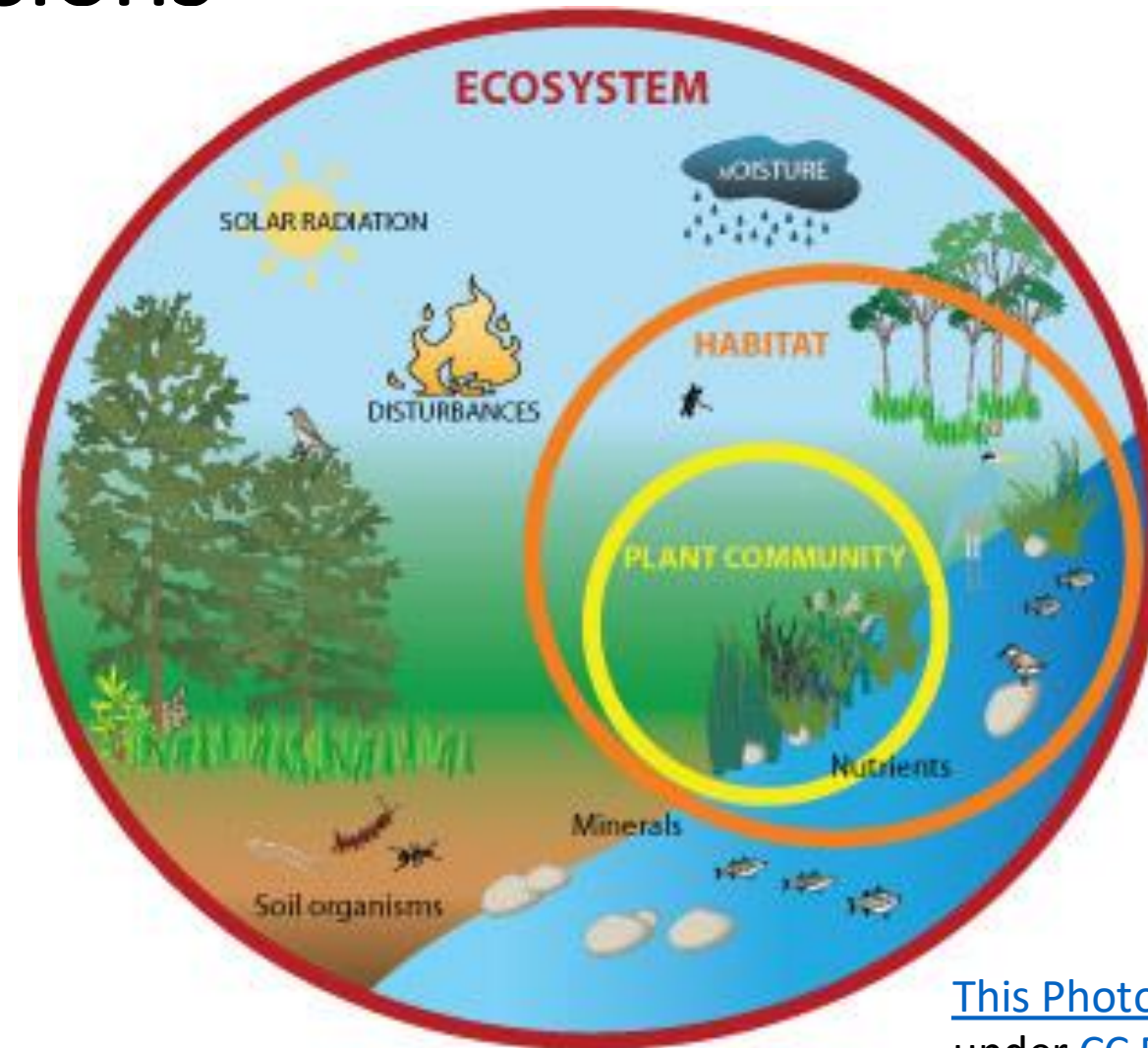
Participants	Objective	Agenda Items
Delivery Managers	Gain visibility into & ensure accuracy of current and forecasted resource demand on top 5 priority projects	Affirm top 5 priority projects
Project Leads		Validate project status / timeframe / changes
RCM		Clarify resource needs with project leads
		Discuss and prioritize action to address needs

Keys
What significant project changes have occurred that would impact resource forecast?
Are targeted resource assignments still valid? Are projected roll offs and starts confirmed?
Are there resources in conflict?
Is the data we are looking at accurate? Changes that could be made to improve accuracy?

Build and Maintain Effective Forecast

1. Implement Strong **Demand Intake Filters**
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5. Make **Decisions**

Make Decisions



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