



Broadcom Community Webcast

TEAM FORECASTING

Sonja Furneaux

January 20, 2021

Today's Session: Team Forecasting



Sonja Furneaux
Sr. Solution Engineer

- Common Resource and Team use cases
- ValueOps Dimensions of control
- Capabilities Demonstration
 - Resource/Team Definition
 - Team Governance
 - Staff Allocation Planning
 - Assignment Mgmt.
 - Labor Actuals
 - Staff Analysis
- Recommendations review with a note on team rates
- Close out with Q&A

Common Resource and Team Use Cases

The following is a list of use cases commonly supported by our ValueOps customers and the capabilities utilized to support them

- Centralized Resource Portfolio Analysis
 - Availability for planning and cost constraints
 - Profile data for slicing/dicing (this includes teams)
- FTE Planning / Value Stream Planning
 - Allocation of Staff to desired investments/value
 - Supports annual financial planning
 - Supports contractor management
- Staff Planning & Forecasting
 - Automated updates for HR/Org/Contract changes
 - Iterative staff planning for value adjustments
 - Determining additional talent needs
- Delivery Timing & Analysis (options)
 - Based on PI/Release feature plan
 - Based on assignment/to do plan
 - Based on effort expended time or calculated actuals

Capabilities

Resource/Team Definition

Team Governance

Staff Allocation Planning

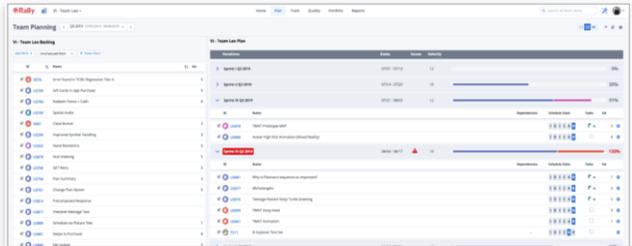
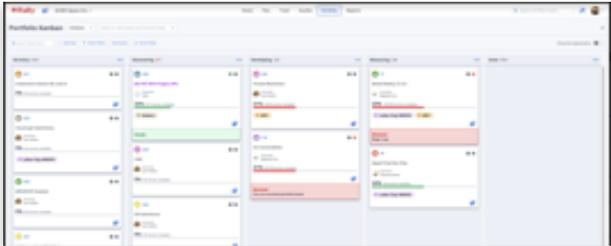
Assignment Mgmt. (optional)

Labor Actuals (optional)

Staff Analysis

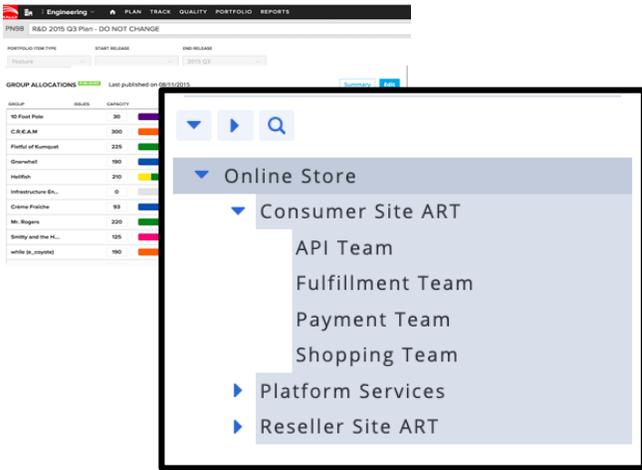
ValueOps Dimensions of Control

Agile Team Planning & Delivery

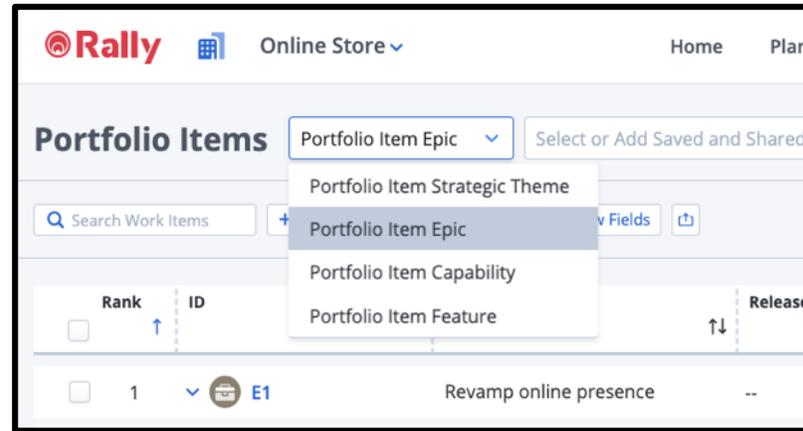


ValueOps Dimensions of Control

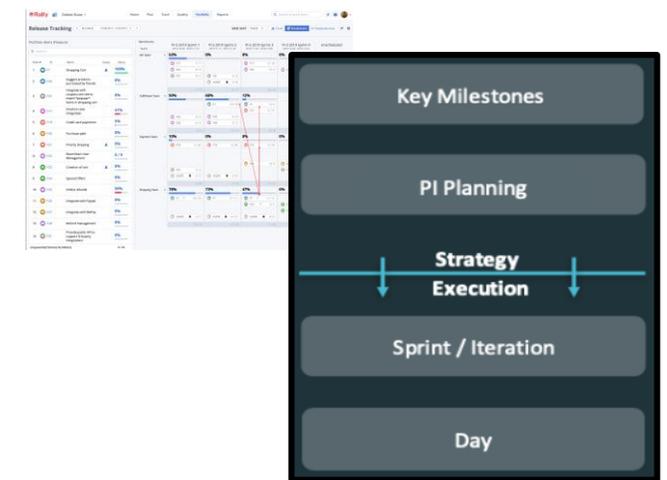
Model Your Organizational Structure



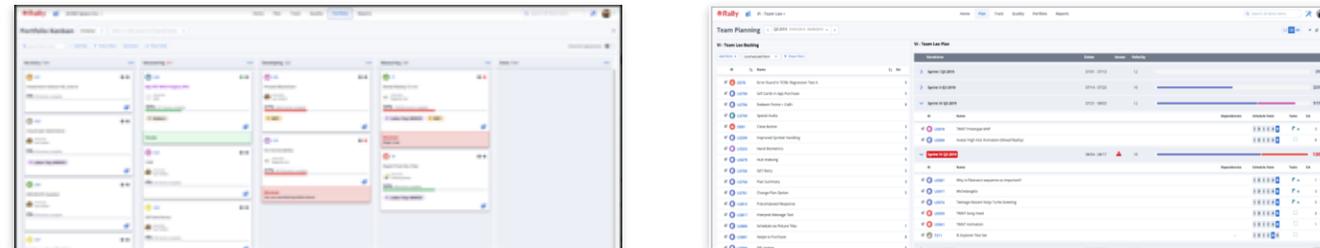
Configure Your Portfolio Item (Work Item) Relationships



Plan/Track Across Releases, Milestones & Iterations



Agile Team Planning & Delivery



ValueOps Dimensions of Control

Allocate People to Value

Align All People to ERP data

Fund People/Investments

Agreements/Dependencies

Align Delivery to Depreciation

Report Progress to Plan

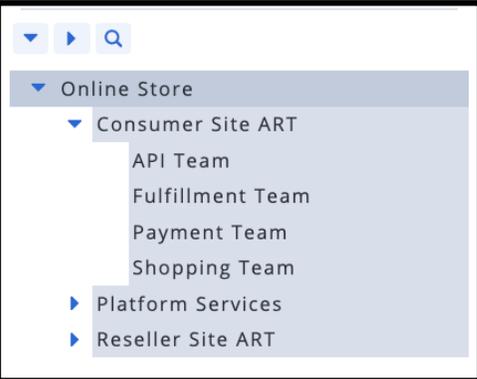
Model Your Organizational Structure

Configure Your Portfolio Item (Work Item) Relationships

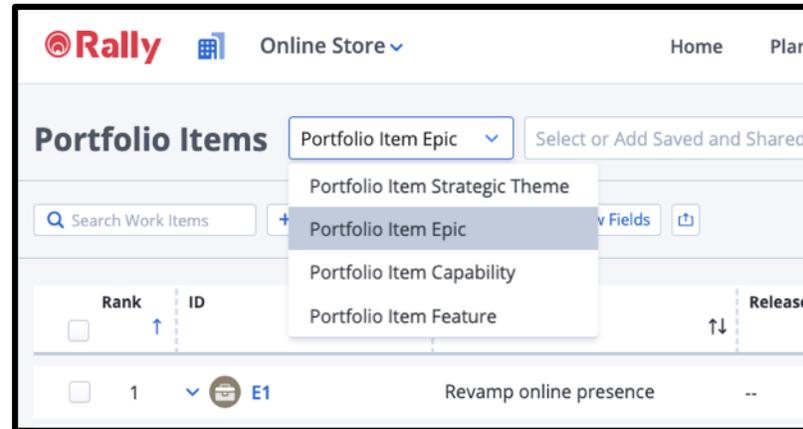
Plan/Track Across Releases, Milestones & Iterations



GROUP	ISSUE	CAPACITY
10 Foot Plan	30	
C.R.E.A.M	300	
Plan of Kumpant	225	
Greenhat	100	
Health	210	
Infrastructure Etc.	0	
Comms Practice	93	
Mr. Rogers	200	
Sally and the H...	125	
white (p...)	100	



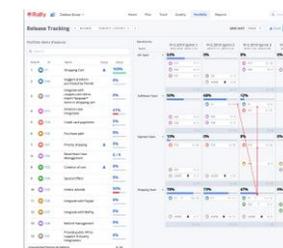
- Online Store
 - Consumer Site ART
 - API Team
 - Fulfillment Team
 - Payment Team
 - Shopping Team
 - Platform Services
 - Reseller Site ART



Portfolio Items configuration options:

- Portfolio Item Epic
- Portfolio Item Strategic Theme
- Portfolio Item Epic
- Portfolio Item Capability
- Portfolio Item Feature

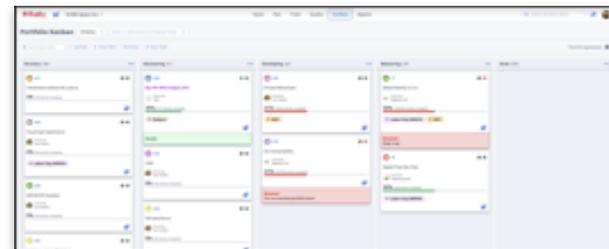
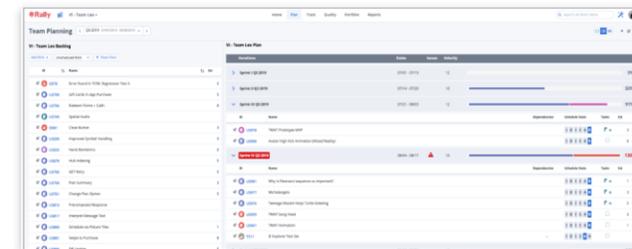
Example item: Rank 1, ID E1, Release Revamp online presence




Release Execution Flow:

- Key Milestones
- PI Planning
- Strategy Execution
- Sprint / Iteration
- Day

Agile Team Planning & Delivery

Capabilities Demonstration



Using Teams: Recommendations Review

- A Team is essentially still a resource so you can still use a role for a TBD team (rate); offers easier replace options
- Partially allocated resources on a team solve a big issue for “horizontal” resources – i.e. RTE
- Fully allocate resources to Teams or not – never have a resource allocated to a team AND directly to an investment (**NOTE – Future capabilities will provide an option for your organization if this is a need**)
- Teams can be used for functional team allocation: Think of QA or DBA resource planning needs or UX Design teams that work across a train or suite of products
- Teams with no resources also of value – consider ‘business’, ‘legal’, ‘marketing’ resource planning needs for when you don’t know the resource but you want to give them tasks or to do’s and want to have them engage for updates
- Finance is typically very flexible once a year to changing how rates are done
 - Plan for that timing when incorporating teams into your resource forecasting
- Note: If planning by Team but putting time by individuals, Timecard information will show the individual but Project actuals will show this aggregated to team resource with no ability to directly drill to time detail.

Team Rates

Same Role Teams

- Blended Role Rate
- Same Resource financial parameters as a resource
- If collecting time individually with rate parameters set on variants like location, actuals will deviate from plan naturally, provide beautiful useful data, but will not “tie out”

Mixed Team (Option 1)

- Overall Blended team rate
- This requires finance to calculate a blended rate for all internal team resources regardless of other factors like location, etc.
- Note – groups who consider moving to this may need to supplement cost forecasting with other aspects of Resource Portfolio Planning

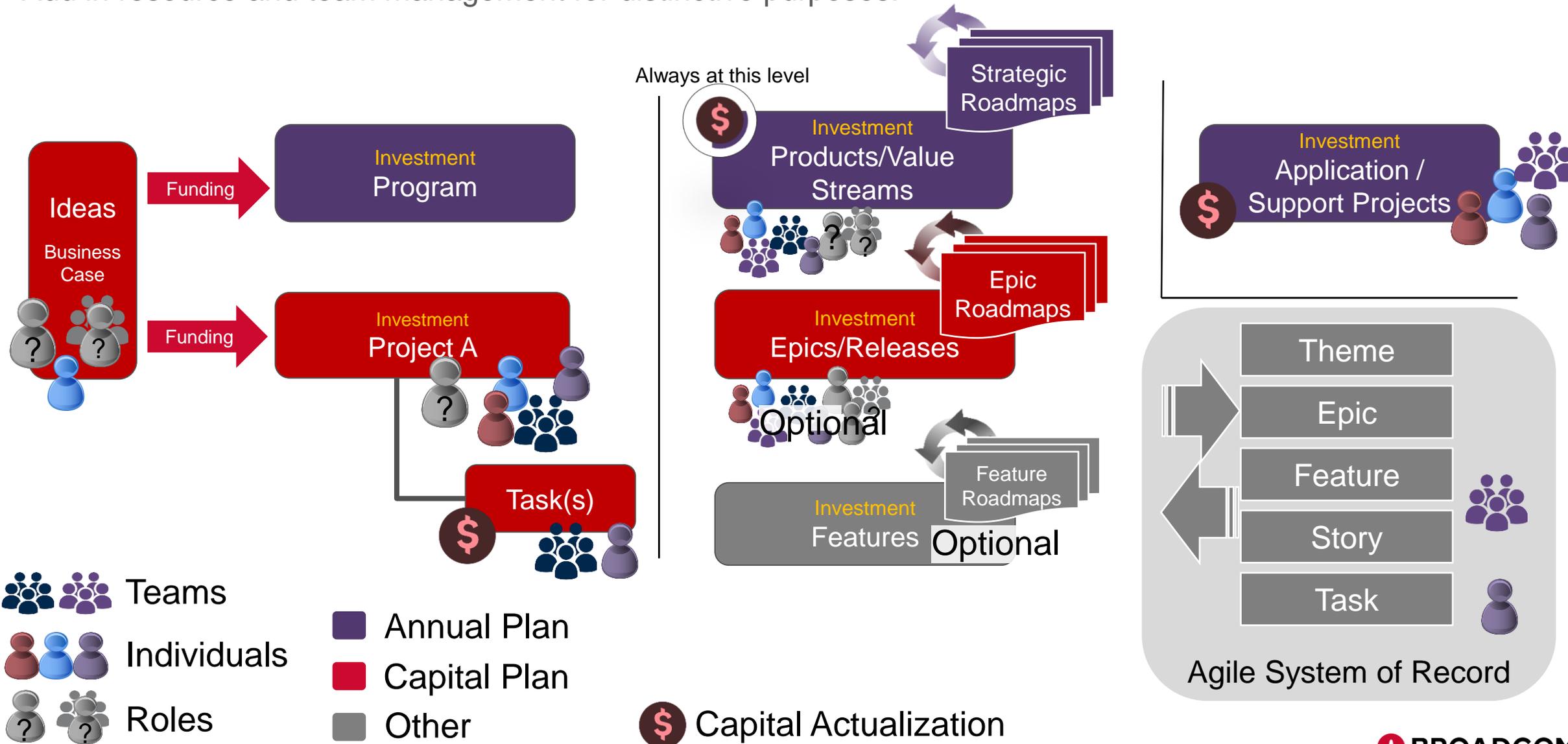
Mixed Team (Option 2)

- Blended Team rate
- Changes to the team need to be monitored so rate changes continue to be accurate for financial forecasting.
(Recommend Automation during implementation for this)

Note – An approach to contractor spend needs to be determined cross all team allocations

Bi-Modal Structure example

Add in resource and team management for distinctive purposes.





Thank You

**DON'T MISS OUR BrightTalk on this same subject
Team Forecasting January 27, 2022**



