Matching staff to tasks – a dating agency approach for Consultants

To deliver their assignments effectively, large firms of Consultants must retain staff with a diverse mix of skills and competencies. This is particularly broad in multi-disciplinary practices, where teams with quite different skills and experience can be required. Maximising the utilization of such a resource pool can be quite difficult:

1. Each person's skills and competencies must be kept up to date, and access to soft data such as recent assignments and personal aspirations is necessary when searching for suitable candidates.

2. Their availability for new work needs to be visible, based on their current commitments and working hours. Both assignment and home locations must be viewable.

3. Plans can change at short notice, as clients delay approval or change the scope. This can unexpectedly free up significant resource that needs to be rapidly re deployed, or call for additional skills that may be in short supply.

4. Costing and billing systems must respond to these changes, so that the costs of additional work will always be seen and recovered whenever possible.

The dating agency model

Successfully matching staff to tasks requires a search through personal data and the typical process is alarmingly similar to the dating agency!

1. Project managers need to describe the required skills and competencies in some detail, when building the team for a new assignment. It may not be immediately obvious which resource manager has the best match for each requirement, so details are best posted on a vacancy board.

2. To achieve utilization targets, each resource manager will view the vacancy board and propose their most suitable candidates. Project managers will want to select the best people by viewing details of recent assignments, qualifications and experience, before making their choice and confirming acceptance.

3. Tracking the status of each assignment is important. Resource managers will want to know if the project manager change the dates or duration of their staffs assignment and may want an option to re-confirm.

4. Soft or provisional bookings may be required to ring fence candidates for anticipated assignments.

Resource Management software

Specialist resource management software, such as that from Innate (www.innate.co.uk) effectively support this process. Many firms try with spreadsheets, but these are inappropriate for all but the smallest resource pools.

The better offerings provide resource planning with a web based spreadsheet style interface, so that:

1. Project managers can easily define the demand, in terms of the required resource type, their necessary attributes, and the time phased work patterns.

2. Details get automatically added to the on line vacancy board, so that resource manager's can propose their most suitable candidates.

3. The project manager can link into the candidates CVs, etc on the HR system and search through text as well as hard data, to decide on the best alternatives.

4. Each assignment's status is tracked through this process, supporting status steps such as proposed, provisional, rejected, confirmed, re confirmed, etc. Emails are generated for staff as their assignments are confirmed, and their Outlook calendars updated.

5. Scenarios enable 'What if…' analysis to explore alternative options, when unacceptable bottleneck occur, or client delay frees up staff unexpectedly.

On demand reports tailored for each manager will dramatically improve the visibility and communication on how the resource pool is being utilized, by exposing bottlenecks and underutilization. Such reports are a sound basis for longer term staff planning, providing the evidence and numbers where re-skilling or recruitment is required.

About the Author

Barry Muir is managing director of Innate, the resource management software company that has been trading for more than 17 years. You can see more detail of Innate and its products at www.innate-management.com