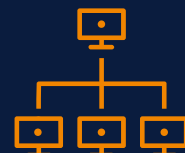




# The resource management conversation guide

How to convince decision-makers to invest in resource management software



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# Resource management matters

Outside of consulting companies, resource management has primarily been considered a semi-clerical function to support people being assigned to projects or otherwise unique work. But this perception is quickly changing due to a number of factors. These include COVID-19, employee disengagement, burnout, and the new emerging world of remote and flexible working. Resource management, with all its varied aspects (skills, capabilities, career development, tacit knowledge, experience) is going to take on a new sense of importance.

According to Forrester, **resource management tools** can bring some of the following time and cost benefits:

**15%**  
**decrease**  
in project failure rate

**10%**  
**decrease**  
in project overruns

**15%**  
**decrease**  
in project throughput times

**10%**  
**reduction**  
in number of low-value projects

**25%**  
**reduction**  
in administrative time

You can learn more about the impact resource management can have on your organization in our whitepaper:

[How to Create an Effective Resource Allocation Process](#)

## Resource management technology needed more than ever

The trick is you can't do resource management successfully without technology. Demand planning at scale, forecasting accurately and intelligently, visibility over the entire resource pool, heatmaps that update in real time – these features (and more) are required to realize the full value of resource management. But getting the investment for this technology is not as easy as it should be. The first question to ask is: who is going to drive this decision up the food chain?

The answer will be different for every company. In some companies it will be the Strategy Realization Office or the Enterprise Project Management Office (EPMO). In others it might be HR. In a few forward-thinking organizations that have already realized the importance of resource management, there may be a Resource Management Office within the IT department. To avoid confusion, we'll refer to the business function requesting resource management investment as the Resource Management Technology Owner (RMTO).

This guide is designed to help you navigate the conversations with the key stakeholders who are needed to get buy-in and sign-off for this most necessary technology investment.



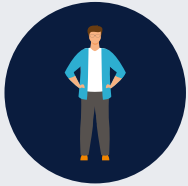
The first question to ask is:

**Who is going to drive this decision up the food chain?**

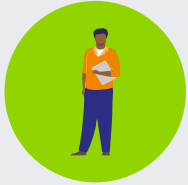
# Tinker Tailor Business Leader

As the RMTO, you need to know who you're talking to. "Who" as in what kind of leader they are. What makes them tick? What arguments are likely to convince them to agree with your plans for resource management? What should you avoid saying at all costs?

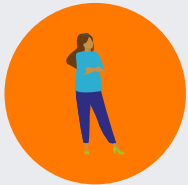
We have identified four prominent business leader personality types to model your approach for. These include:



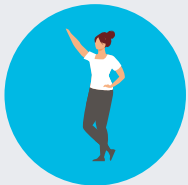
## The Isolationist



## The DIY leader



## The Want it Now leader



## The Visionary

We'll explore these in more detail below and offer advice on how the RMTO can win over each personality type. This way you can tailor your conversations to make the biggest impact with the business leaders at your organization.

## Here's to your master plan

We'll also provide guidance on how to present cases for both enterprise-level and business unit-level resource management. This way you can provide a detailed analysis of the transformational impact resource management can have in each case, as these vital conversations must be approached differently by the RMTO.

## Prepare an engagement strategy

### “Fail to prepare, prepare to fail”

As you may only have one shot to make your case, preparation is essential. This isn't the time to take a chance. The first step of the master plan is the preparation stage – and it's perhaps the most important.

Maybe you only need to get sign-off from the CEO but at larger organizations there may be a lot of hoops to jump through to convince several stakeholders. To succeed with these conversations, you must prepare and approach each conversation on its own terms. The content of your arguments may remain the same – but you need to tailor your key points to be most effective for the type of business leader/decision-maker you are presenting to.

### Get in the head of your business leaders

It may not have been what you were expecting. But this means starting with a psychology lesson – of sorts. We may not have a psych degree here at ProSymmetry, but what we do have is a lot of experience in the boardroom and we know the different types of people that make it to the top of organizations. You know what they say: it takes a certain kind of personality to reach the top.

It's key to understand the different audiences you're dealing with and how this affects the way they make decisions. You need to consider what message is most important to them, and what arguments are likely to get them onboard with your investment plans. Then you can develop an engagement strategy based on the different temperaments of business leaders.

# Identify your target

It all starts with your business leader. Targeting your stakeholders requires knowing who they are and understanding what they will respond best to. This is the key to engaging them in your arguments and ultimately convincing them to invest in resource management software.

Here's a reminder of the four personality types.



**The Isolationist**



**The DIY leader**



**The Want it Now leader**



**The Visionary**

Now it's time to decide which one best fits the business leaders at your organization.

# Four business leader personality types

Here's a breakdown of each personality type.



## The Isolationist

The isolationist believes the remit of their role should stay resolutely distinct from other parts of the organization (be it IT, HR, NPD). They value their time above all else and do not want to be involved in projects and decisions that they believe should be taken care of by IT. In this sense, they isolate themselves away from individual business units on their own island and run the enterprise from afar.



## The DIY Leader

The DIY Leader was perhaps an isolationist in the past or still harbours that philosophy deep down, but the DIY Leader now wants to get more involved in their projects. Their main concern is worrying about reaching the full scope of the project, so this drives them to take control and adopt a “do it yourself” outlook.





## The Want it Now Leader

The Want It Now Leader has ambitious plans for applications solutions. They have even bigger beliefs in their own abilities to succeed. This leads to an overwhelming need to control every aspect of a project, often shutting out other people's viewpoints. Because they believe in the absolute importance of the project, they believe they must be the one to take control. However, the Want It Now Leader is impatient for success, and values speed-to-market above all else.



## The Visionary

The Visionary is similar to the Want It Now Leader but with one important difference. They are much more likely to make decisions based on rational considerations. They are willing to take big risks and want to achieve business outcomes. But they are far more prepared to listen to reason and take on alternate viewpoints if it helps them achieve their lofty goals.

# Developing and delivering your strategy

It's crucial for the RMTO to develop an engagement strategy and plan of action for the type of business leader you will be dealing with. This should include the following:



## Create a discussion plan

This will become your bible. Make sure you write down all that you need to cover. Don't turn it into your War and Peace. Instead it needs to be concise, clear, and well-structured, so that it is easy to follow, and you don't miss anything important.



## Outline key messages

Outline the main reasons why a dedicated resource management tool will benefit your business, e.g., how improving visibility over resources helps to optimize resource allocation. Then why this provides value by boosting the bottom line. We will go into more detail on what should be included later in this whitepaper.



## Prioritize benefits

Go through all the benefits listed and prioritize which are the most important for the organization, and then also which will be compelling for the type of business leader(s) you will be presenting to.



## Customize the message

Tailor and personalize the message to fit the right type of business leader



## Communicate a vision

Ensure that everything is aligned to wider business objectives as well as project management targets. This can help to drive home just how valuable the technology will be in helping the organization grow, and also help illustrate how it will fit in with company culture.



## Provide relevant insights

Data, stats and figures can go a long way to back up the arguments you're making. Also carry out research, dive into past reports about project success or failure, and make use of the information in this whitepaper.



## Bring it to life

Use examples of real scenarios (from the past or future) that could benefit from a dedicated resource management solution. This grounds your arguments in the reality of the organization's day-to-day, and helps illustrate some of the more technical aspects of your arguments for your audience, who may not have such a keen grasp of resource management concepts.

For more advice on how to make your investment in resource management go further, read our eBook:

[\*\*Nine Steps for Implementing Resource Management\*\*](#)

# 03 Business leader engagement guide

## The Isolationist

Putting boundaries up between them and the rest of the organization, the Isolationist believes in focusing on the bigger picture.

### How to identify them

The Isolationist always defers to your team as the experts and expect you to take responsibility, make all the decisions, and get everything done independent of their contribution. Although it might seem an unfair characterization, the Isolationist often believes that they have more important matters on their plate than to deal with you. Their time is very precious to them. Someone has to run the organization, you know.

### Biggest challenge

It can be hard to get their feedback on any issues, and they may not respond at times when you need their input. They may not be prepared to spend their time having the conversation, let alone engaging with you in a productive way.

### How to engage

- They don't like their time to be wasted. So be economical with time spent in meetings – always be clear and succinct.
- To get them to engage you need to highlight how their input can help avoid high risks.



# The DIY Leader

The DIY Leader may not put many – if any – barriers up between them and the rest of the organization, with a view to controlling results.

## How to identify them

The DIY Leader talks about their past successes and how their way of doing things proved to work well. They may have a lot of pride in their time-intensive, hands-on approach, which can be valuable in some instances. But there is a thin line between helping and hindering when it comes to leaders without specialist expertise immersing themselves in decisions that involve specialist knowledge.

## Biggest challenge

Because they want everything to go their way, they are reluctant to give the green light if there is a risk at the outset of underperformance.

## How to engage

- Tailor your arguments to address their fears around risk and offer concrete steps for how to gain desired outcomes.
- Make sure to understand their point of view, demands, and expectations but highlight how trust in your team's expertise and experience can lead to success.



# The Want It Now Leader

The most unruly and difficult to work with of the four personality types, the Want It Now Leader can cause a lot of frustration. Yet, their willingness to push forward with their vision has got them where they are today.

## How to identify them

The Want It Now Leader has a tendency to be rigid and stubborn with their point of view, but they meander and become impractical when it comes to how to achieve their goals. They can seem frustrated with a lack of progress or when colleagues are unable to fully realize their ambitions. The Want IT Now Leader often has an “all or nothing” approach.

## Biggest challenge

They put the enterprise at risk by not listening to other viewpoints. It will be hard to get your points across if not framed in a way which makes an immediate impact that is aligned with their ambitions for the organization.

## How to engage

- Tailor your conversations to highlight how your initiatives align with their goals and objectives – and don't be afraid to go all-in and show them how your solution will help them achieve the organization's vision.
- Make sure to understand their point of view, demands, and expectations but highlight how trust in your team's expertise and experience can lead to success.



# The Visionary

The Visionary is ambitious, driven, will take risks, but is also willing to listen to reason or other viewpoints, as long as everyone is fundamentally in line with their vision.

## How to identify them

For the Visionary, success is always measured by size of outcome, with a “go big or go home” attitude. This leads to risks being taken, but often these are calculated risks rather than reckless ones. Yet, determined to take the organization to new heights, incremental success may not be in their nature. They will be impatient for success and expect the same from their colleagues.

## Biggest challenge

They tend to take big risks for high rewards. This can be great for getting projects off the ground but lead to issues further down the line and can also mean they are more interested in investing in flagship or headline-grabbing initiatives.

## How to engage

- Really sell the benefits of your proposed solution. Arrive to your meeting or conversation prepared with data to show how resource optimization can impact the wider business.
- Focus on how this investment aligns with the company's goals and vision.



# ProSymmetry: Your strategic ally in resource management

We hope you have found the insights in this guide useful. With this master plan by your side, the RMTO will be better positioned to make a success of resource management conversations.

You know as well as we do that solutions dedicated to optimizing resource capacity at the enterprise and business unit-level can help organizations succeed in the uncertain and challenging times businesses find themselves in today. Persuading decision-makers to invest is a different issue. But by following our guidance you can show them exactly why resource management matters.

At ProSymmetry we are experienced strategic portfolio management specialists. Tempus Resource, our dedicated resource management solution, has reshaped resource management for organizations across the world, including world leaders like Deloitte, Qualcomm, and Siemens.

**Deloitte completed 55% more projects using Tempus Resource compared to previous years. Siemens reduced project cycle time by 20%, meaning it was able to move three major product development projects by more than a year.**

With industry-leading functionality for resource forecasting and capacity planning, we can help your organization optimize resources to reach your objectives. Along with the functionality and performance of Tempus Resource, we offer a strong consulting partnership to help you realize the potential of your product roadmap and future vision.

To learn how we can help you improve resource management at your organization, get in touch with the team at ProSymmetry for a demonstration and free trial of our award-winning resource management platform, – Tempus Resource.

[Get in touch with the team](#)



# About ProSymmetry

## “A Resource Management Tool for the Masses”

### Tempus Resource, a Gartner PPM Cool Vendor, Hype Cycle Leader and Market Leader in Strategy Execution

Tempus Resource, a Gartner PPM Cool Vendor, Hype Cycle Leader and Market Leader in Strategy Execution, revolutionizes resource management by combining simplicity and sophistication. Tempus simplifies resource forecasting and planning while providing unparalleled insight through industry leading dashboarding, predictive analytics, and what-if analysis capabilities. Contact ProSymmetry today for a free and unlimited access 30-day trial using your data.

[Contact ProSymmetry today](#)

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