

OPERATING PLAYBOOK

From Resource Planning to Revenue

Connect the staffing decision to the financial outcome.



A practical working document

Use the examples and review tools to make the next decision clearer. Start with one engagement, one owner and evidence your teams can verify.

IN THIS EDITION

- 01** Demand and capacity
- 02** Allocation and redeployment
- 03** Delivery and effort
- 04** Revenue and exceptions
- 05** Worked example and review tools

FRAMEWORK / 1

Demand before the project starts

A connected decision needs evidence, ownership and a clear handoff.

01 Demand before the project starts

Translate upcoming work into dated resource requirements. Capture the skill, effort, duration and confidence of each need. A likely opportunity and a signed project should remain distinguishable so planners can model scenarios without double-booking people against uncertain demand.

REVIEW POINTS

- Skills required
- Demand confidence
- Start and end dates

02 Capacity with real constraints

Available capacity is not simply headcount. Subtract existing assignments, leave, working patterns and internal commitments from the planning horizon. Compare supply with dated demand by skill and role, and inspect upcoming releases before deciding that a gap requires a new hire.

REVIEW POINTS

- Working calendar
- Leave
- Planned releases

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 2

Allocation on one timeline

A connected decision needs evidence, ownership and a clear handoff.

03 Allocation on one timeline

See project assignments alongside the people doing the work. Weekly and monthly views reveal overlaps, unassigned demand and timing conflicts that a list of names cannot. Review assignment percentages with the underlying working hours so a part-time colleague is not treated as a full-time resource.

REVIEW POINTS

- Weekly scheduling
- Assignment percentages
- Part-time capacity

04 Bench and redeployment

Identify people approaching the end of an assignment and connect them to upcoming work. Review bench exposure against demand timing and skill fit rather than pushing every available person into the first open slot. Earlier visibility creates room for redeployment, targeted development or a revised staffing plan.

REVIEW POINTS

- Roll-off dates
- Bench horizon
- Upcoming opportunities

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 3

Backlog and work boards

A connected decision needs evidence, ownership and a clear handoff.

05 Backlog and work boards

Organize epics, use cases and backlog items into a delivery workflow. Track work through agreed states so the team can distinguish work waiting to start from work actively in progress. Keep the board connected to project priorities and use it to resolve constraints, not only to report activity.

REVIEW POINTS

- Epics and use cases
- Work status
- Delivery priorities

06 Forecast against actual effort

Compare expected effort with recorded work throughout delivery. Review the remaining effort as well as the variance already incurred. A project can be busy and still be moving away from its commercial plan; early variance reviews give delivery and finance time to discuss scope, staffing or estimates.

REVIEW POINTS

- Effort forecast
- Actual time
- Remaining work

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 4

Revenue with an operational basis

A connected decision needs evidence, ownership and a clear handoff.

07 Revenue with an operational basis

Build the forecast from work that can realistically be staffed and delivered. Keep opportunity assumptions, committed work and billing expectations distinguishable. When a date or allocation changes, review the downstream revenue effect instead of updating the finance forecast independently of delivery.

REVIEW POINTS

- Committed work
- Forecast assumptions
- Delivery dates

08 Commercial exceptions

Review billing exceptions against the engagement's agreed terms. Rate discrepancies, purchase-order constraints and missing approvals require different resolution paths. Keep the reason and accountable owner visible; a single unbilled total does not explain which decisions will release the value.

REVIEW POINTS

- Rates
- Purchase-order constraints
- Exception ownership

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

WORKED EXAMPLE

Availability is not headcount.

Illustrative scenario - not a customer result or a product performance claim.

A person has 40 contracted hours, 8 hours of leave and 4 hours of internal commitments. Assignable capacity is 28 hours. A 24-hour allocation leaves 4 hours of headroom. Adding another 12-hour assignment exceeds that capacity by 8 hours.

40 h

Contracted time

28 h

Assignable capacity

24 h

Existing allocation

$40 - 8 - 4 = 28$ hours assignable

$24 + 12 - 28 = 8$ hours over capacity

Define

State the period, population, units and calculation.

Verify

Trace the number to source records; date the evidence.

Act

Assign an owner and state what would change the decision.

IMPLEMENTATION

A practical 30 / 60 / 90-day cadence.

Start with a bounded workflow. Extend only when the handoffs can be explained and repeated.

01

DAYS 1-30

Establish the baseline

Choose one workflow and one accountable sponsor. Map inputs, owners and exceptions. Agree the decision to improve and capture a baseline using current records.

Output: a workflow map, owner and baseline.

02

DAYS 31-60

Run a bounded pilot

Use the same definitions in recurring reviews. Test missing data and exception paths. Track whether teams can explain decisions and complete handoffs without additional reconciliation.

Output: a tested handoff and exception log.

03

DAYS 61-90

Decide what to extend

Review evidence with participating teams. Resolve recurring gaps before broadening scope. Document ownership, training needs and the conditions required for the next rollout.

Output: an agreed expansion or improvement plan.

WORKING SESSION

Use one engagement as the test case.

A 45-minute review for the people who own the handoffs.

00-10 min

Frame the decision

Describe the engagement and the next commitment. State the decision, deadline and assumptions.

10-25 min

Review the evidence

Walk through dated demand, capacity, delivery commitments and financial context. Identify missing or contradictory records.

25-35 min

Resolve the handoff

Agree who supplies each missing input and who can approve the next action. Keep facts and estimates separate.

35-45 min

Commit and review

Write the action, owner and due date. Define the evidence to check at the end of the session.

PREPARE BEFORE THE SESSION

Bring one real engagement, its source records and the people who can approve the next handoff.

REUSABLE WORKSHEET

Record the decision and its basis.

Complete this page together. Keep assumptions visible and commit to a dated review.

Decision / engagement

What decision must be made, and by when?

Evidence / source records

Which records support it? Include dates and definitions.

Assumptions / missing information

What is uncertain or still needs validation?

Action / accountable owner

Who will do what, and who approves the handoff?

Review / outcome

What evidence will show whether the action helped?

REVIEW & NEXT STEPS

Make the framework part of the operating rhythm.

The value is in the decision that follows the review.

01 Before the review

Check that the evidence covers the same period and population. Confirm owners, units and approval status.

02 During the review

Investigate exceptions and changing assumptions. Do not combine estimates with confirmed transactions or treat activity as an outcome.

03 After the review

Publish the decision, rationale, owner and next review. Retain enough context for the receiving team to understand the handoff.

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