

Resource planning that actually works

From task lists to capacity foresight: what it takes to implement resource planning successfully, when your organisation needs it, and how AI is changing the game.

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25 years working with resource planning as a domain

Note: this paper was visualised with the help of AI. Insights and content are by the author.

PLANNING HORIZON

TASK Tasks, deadlines, status



RESOURCE People, bookings, clashes



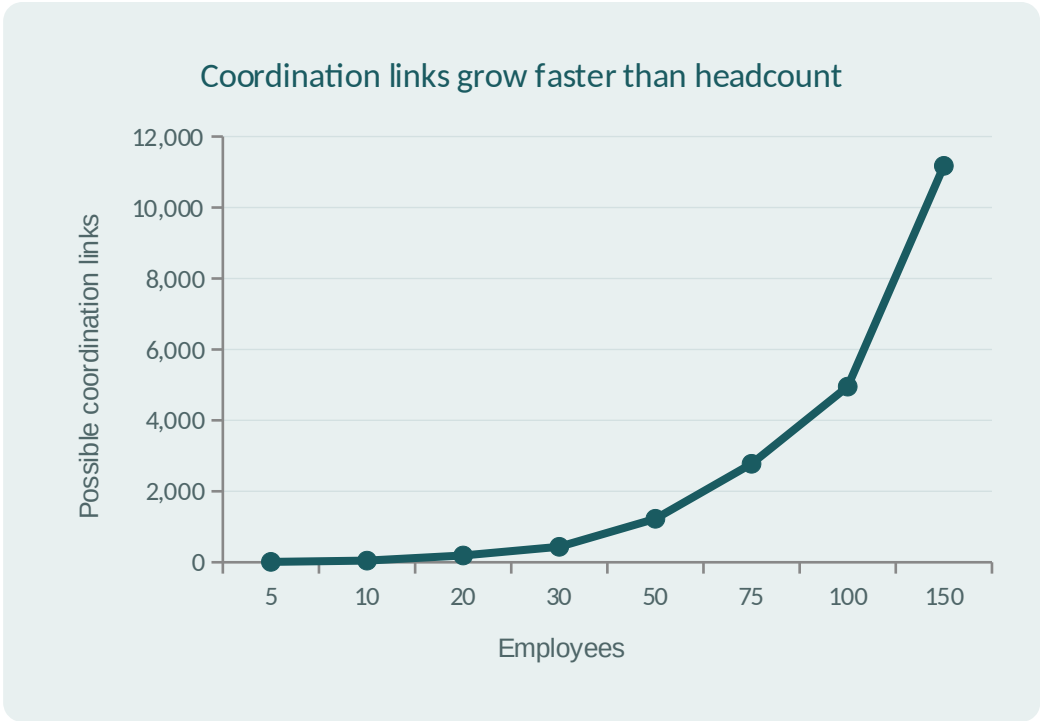
CAPACITY Roles, FTE, pipeline, revenue



Today Weeks Months Quarters

Detail decreases as the horizon grows

When does a company need resource planning?



$n \text{ people} \rightarrow n(n-1)/2 \text{ possible links: } 10 \text{ people} = 45, 30 = 435, 100 = 4,950$

SIGNALS THAT MATTER MORE THAN HEADCOUNT

- 10+ concurrent projects
- Specialists shared across teams
- Billable utilisation targets
- Sales commits without checking availability
- Overtime and bench at the same time

1-15

Everyone knows everything

A task tool and a weekly stand-up are enough.

15-40

First conflicts over shared experts

Spreadsheets appear. Resource planning starts to pay off.

40-150

Many teams, competing projects

Structured resource planning and a resource manager role are essential.

150+

Portfolio and hiring decisions

Capacity planning tied to pipeline, recruitment and finance.

Six fundamentals of successful resource planning



01

Keep it simple

Plan hours per person per week, not minutes per task. Detail you cannot maintain destroys trust.



02

Clear ownership

Explicit roles for who requests, who allocates and who resolves conflicts — with an agreed escalation path.



03

One source of truth

Plans, bookings, actuals and financials in one integrated flow — linked to the ERP, not maintained in parallel spreadsheets.



04

A fixed planning rhythm

A weekly staffing and request flow, monthly capacity and revenue review, quarterly outlook. The cadence is the system.



05

Skills and availability data

Current skill profiles, absence and contract data let you staff by competence, not by memory.



06

Plan pipeline and revenue

Plan opportunities alongside projects and forecast revenue, not just resources. That is how you take the right decisions.

Look for the orange tags: each fundamental is followed up on the pages ahead.

Resource planning succeeds when everyone follows a simple process

1

Rule number one: keep it simple

Plan hours per person per week, not minutes per task. Detail nobody can maintain destroys trust in the plan.

EVERYONE HAS A PART

-  **Project managers** request the right people, early
-  **Resource managers** confirm bookings and resolve conflicts
-  **Consultants** keep availability, skills and time up to date
-  **Sales** keeps the pipeline current
-  **Management** decides on capacity and priorities

If one role skips its part, the plan stops being trusted — and people go back to their spreadsheets.

THE CORE IDEA

Resource planning is not a tool you install.

It is a process everyone takes part in, every week. The tool makes it visible, fast and repeatable, but only if everyone does their part.

Divide your planning into three areas — each with its own horizon

The core problem: in professional services, time is the product — and it **cannot be stored**. An hour not planned today cannot be sold tomorrow.



TASK MANAGEMENT

Problem: Work gets lost, duplicated or forgotten between people.

Kanban board SOLUTION

To do

Doing

Done

Answers: what do we work on next?

With AI: flags tasks at risk of slipping

RESOURCE PLANNING

Problem: The same experts are promised twice — while others sit idle.

Resource overview SOLUTION

Anna

Ben

Carl

Dina

Answers: who works where — and what clashes?

With AI: proposes best-fit people

CAPACITY PLANNING

Problem: Sales commits to work the firm cannot deliver — or hires too late.

Capacity & revenue forecast SOLUTION

Jan

Feb

Mar

Apr

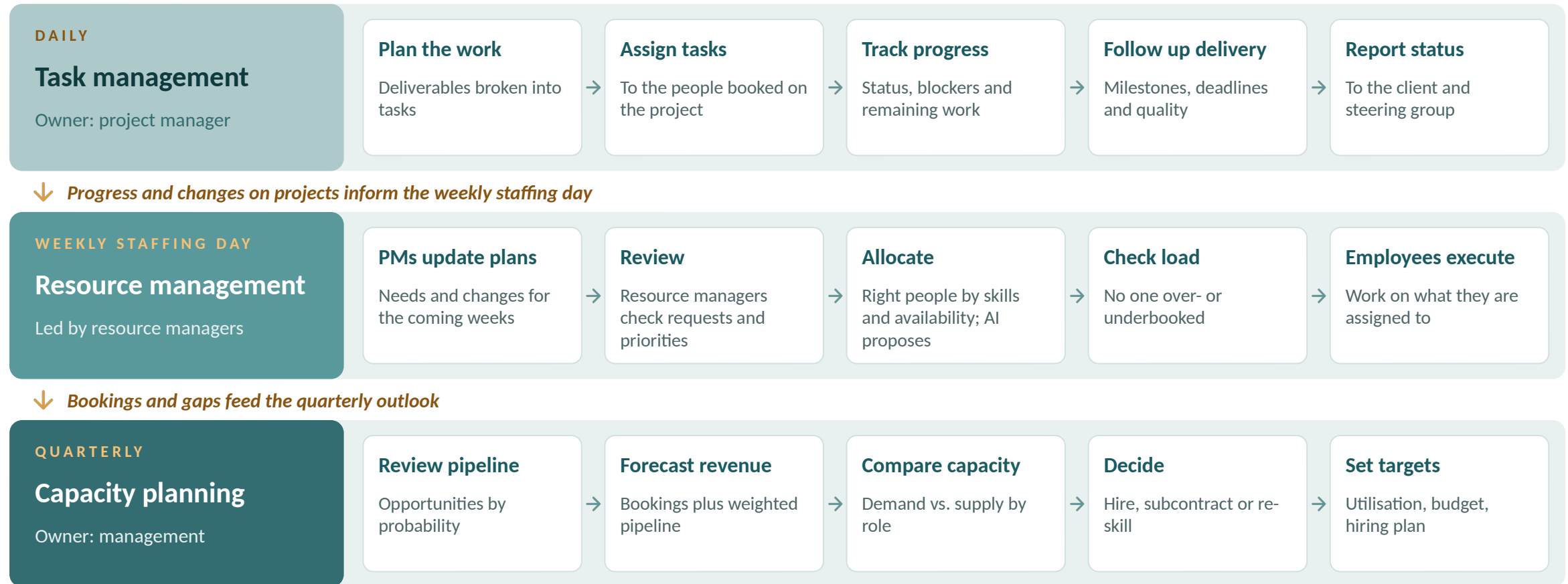
May

Jun

Answers: hire, subcontract, decline or re-phase?

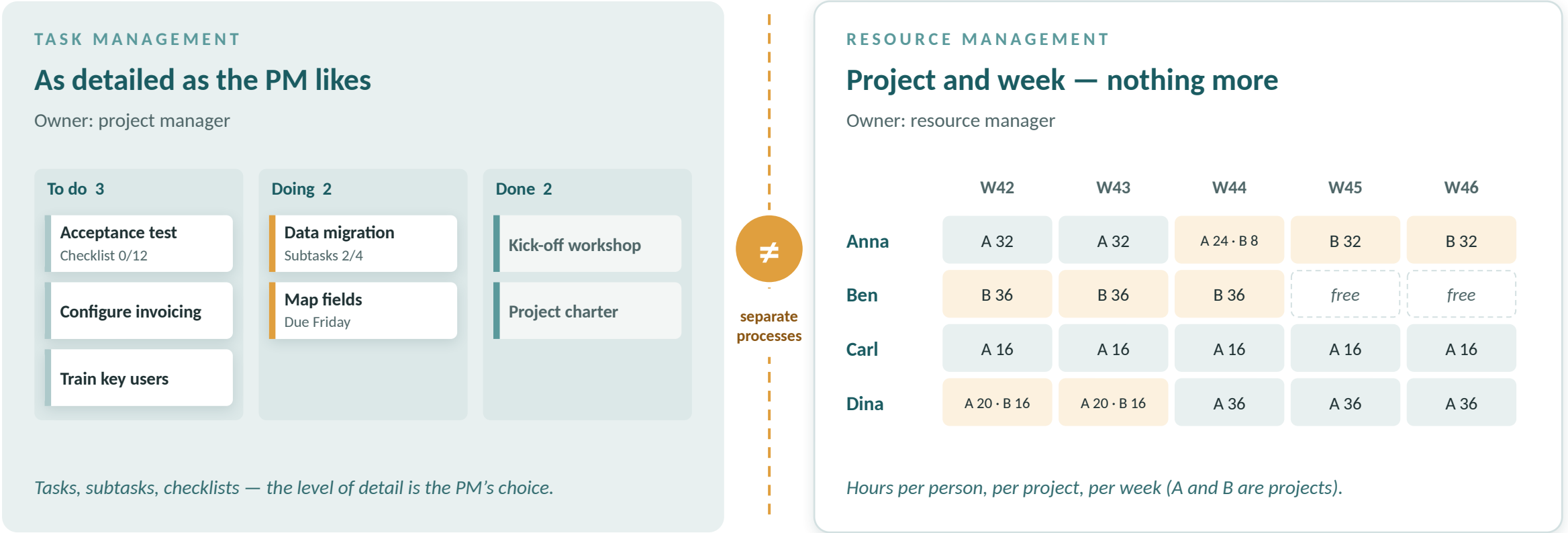
With AI: simulates pipeline scenarios

Three processes, three rhythms — one plan



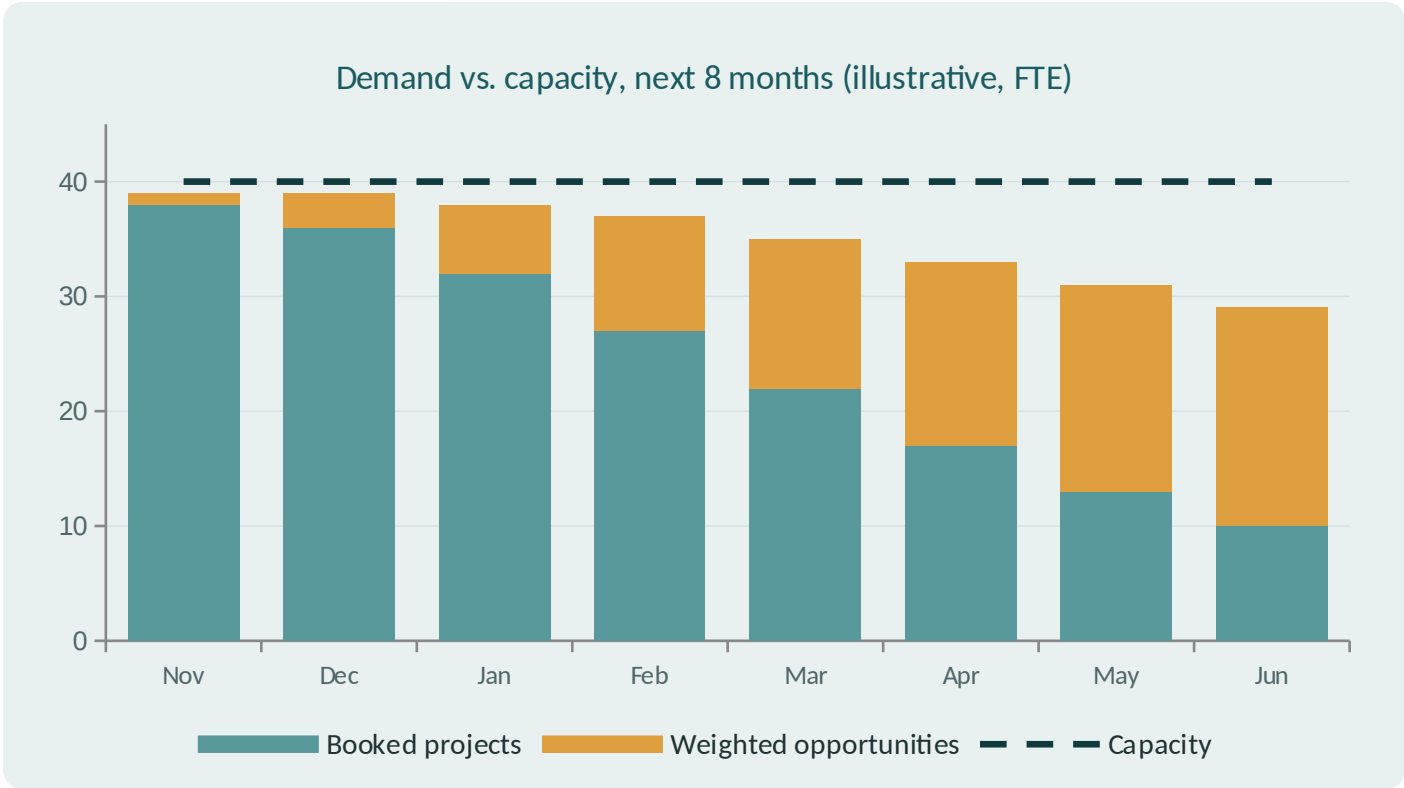
All three run on the same plan — which is why one source of truth and a simple level of detail matter.

Separate task management from resource management



One source of truth: both views live in the same system. PMs keep their detail; resource managers see the weekly totals.

Add opportunities to the plan — and see months ahead



TWO PLANS, ONE VIEW OF THE FUTURE

Resource plan
Who works on what: bookings and opportunities by role

Revenue plan
What we expect to invoice: bookings plus weighted pipeline

WHAT THE COMBINED VIEW TELLS YOU

- Demand above capacity** → Hire, subcontract or re-phase
- Demand below capacity** → Push sales, re-skill, cut subcontractors
- Big deals undecided** → Plan scenarios: win both, one or none

Why opportunities matter: booked work alone makes the future look empty. Capacity planning needs the pipeline to see 6–8 months ahead.

Good planning starts with the right data — so does AI

AB

Anna Berg

Senior consultant • Data and analytics

SKILLS AND COMPETENCES

Power BI and reporting

Data modelling

Project management

Workshop facilitation

SIMILAR PROJECT EXPERIENCE

✓

BI platform rollout, engineering firm (2025)

✓

Finance reporting redesign (2024)

✓

Data warehouse migration (2023)

AVAILABILITY

Free from W45

THE FOUNDATION FOR AI-BASED PLANNING

AI-based planning — Proposes the right team in seconds

Availability and bookings — Who is free, when and for how much

Similar project experience — What each person has delivered before

Skills and competences — Verified skills, levels and certifications

Build from the bottom: AI is only as good as the data it stands on.

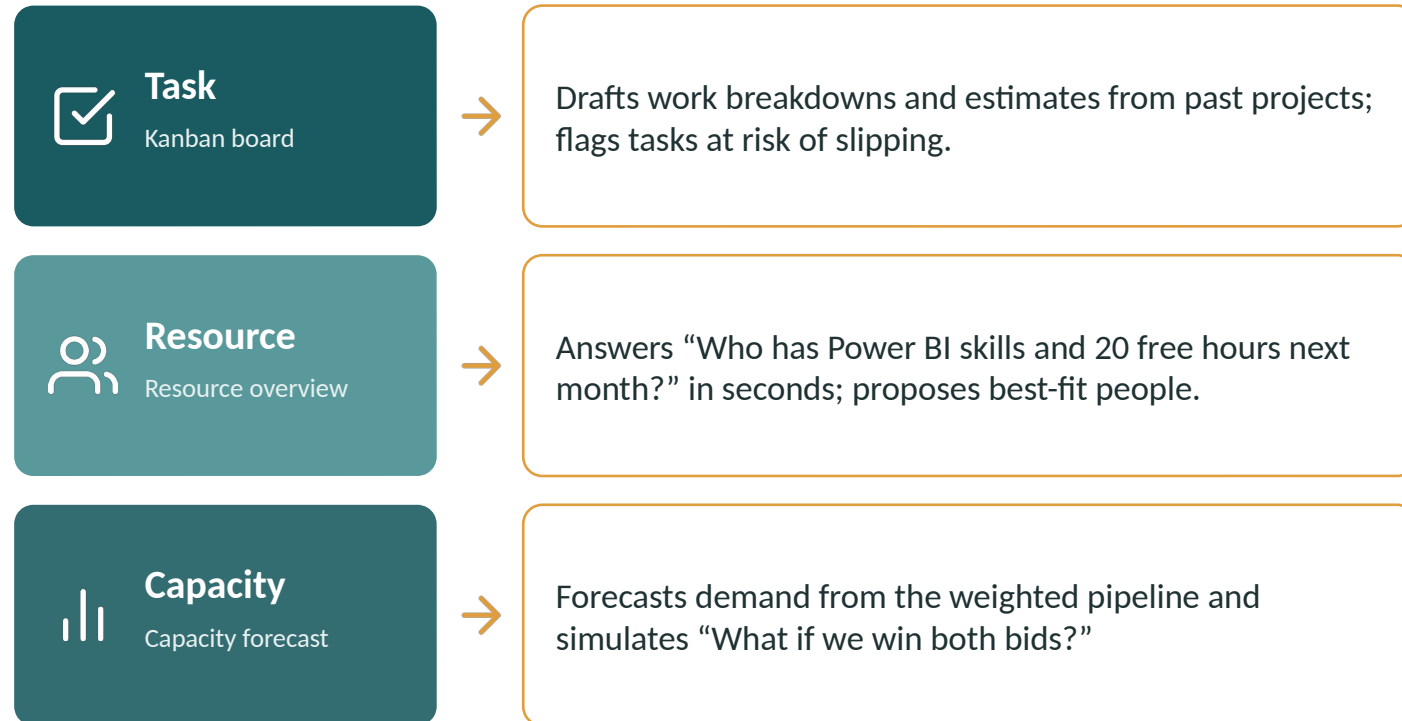
The rule: keep profiles current. An outdated skill profile is worse than none — it makes both people and AI pick the wrong team.

VOLI • White paper: Resource planning that actually works

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AI changes how we plan — not who decides

WHAT AI CHANGES



WHAT AI DOES NOT CHANGE

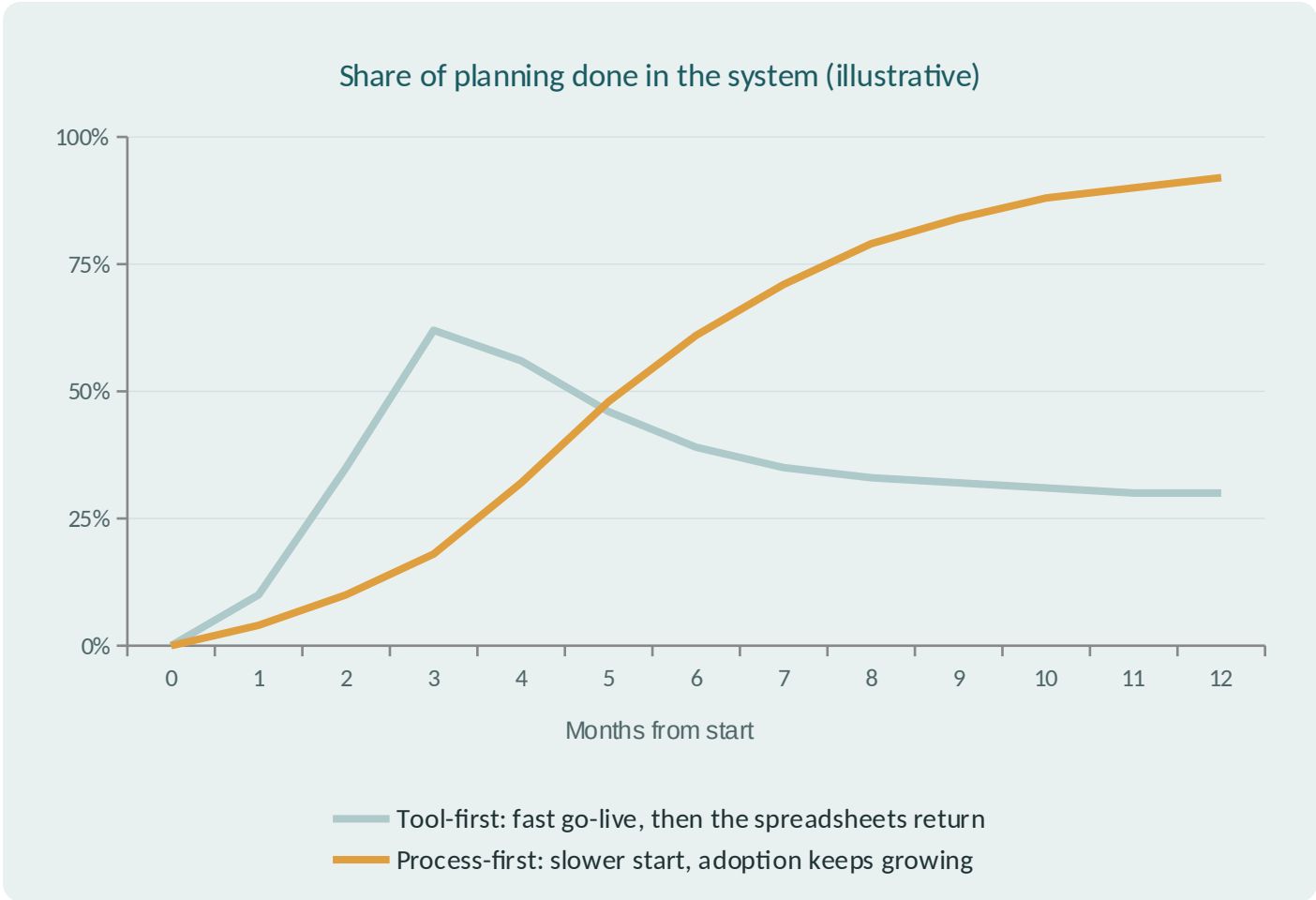
People own the decisions

- Priorities between clients and projects
- Development, wellbeing and career fit
- Hiring and pricing commitments
- Accountability to clients and teams

The resource manager's role shifts from schedule keeper to decision owner and people coach.

So will AI replace resource planning? No. It removes the admin, not the need — and only plans as well as the data and priorities you give it.

Agree the process first — then configure the software



THE PATH — AND WHAT EACH PHASE DELIVERS

- 1 Diagnose** 2-4 wks
The painful question named; roles, data and tools mapped
- 2 Pilot as process design** 8 wks
Planning rhythm and roles agreed in one unit
- 3 Configure the solution** 2-6 wks
Standard software set up to fit the agreed process
- 4 Roll out in waves** 6-12 wks
Units book 4 weeks ahead; spreadsheets retired
- 5 Embed and improve** Ongoing
Opportunities planned too; revenue forecast and AI added

Where are you today — and where to start



01 Name the painful question

Late tasks, clashing bookings or work you cannot deliver? That decides which discipline to fix first.

02 Run an 8-week process pilot

Agree the planning rhythm, roles and granularity in one unit, with the solution as reference model.

03 Build the AI data foundation

Integrated bookings, skills and actuals turn AI from a demo into a daily planning partner.

Learn more: read more, watch short video tours and book a free resource planning health check at voli.dk