

Revenue-Driven



Resource Planning For Agencies

Learn about revenue-driven resource planning from agencies like Ogilvy, TBWA, Code and Theory, and others.

It's time to talk about **impact**

Resource management is not just some tedious managerial task.

It's a highly strategic function that directly impacts an agency's revenue and bottom line.

That said, resource management is an intricate process that involves strategic planning and allocation of various resources. This includes increasing productivity and finding efficiencies across people and projects—all while maintaining work-life balance for employees and making sure client relationships are thriving.

Phew. Some task!

That's why we decided to reach out to some of the industry's most experienced resource managers and planners to find out how they do it.

We hope you'll learn as much as we did!

– Team Guru

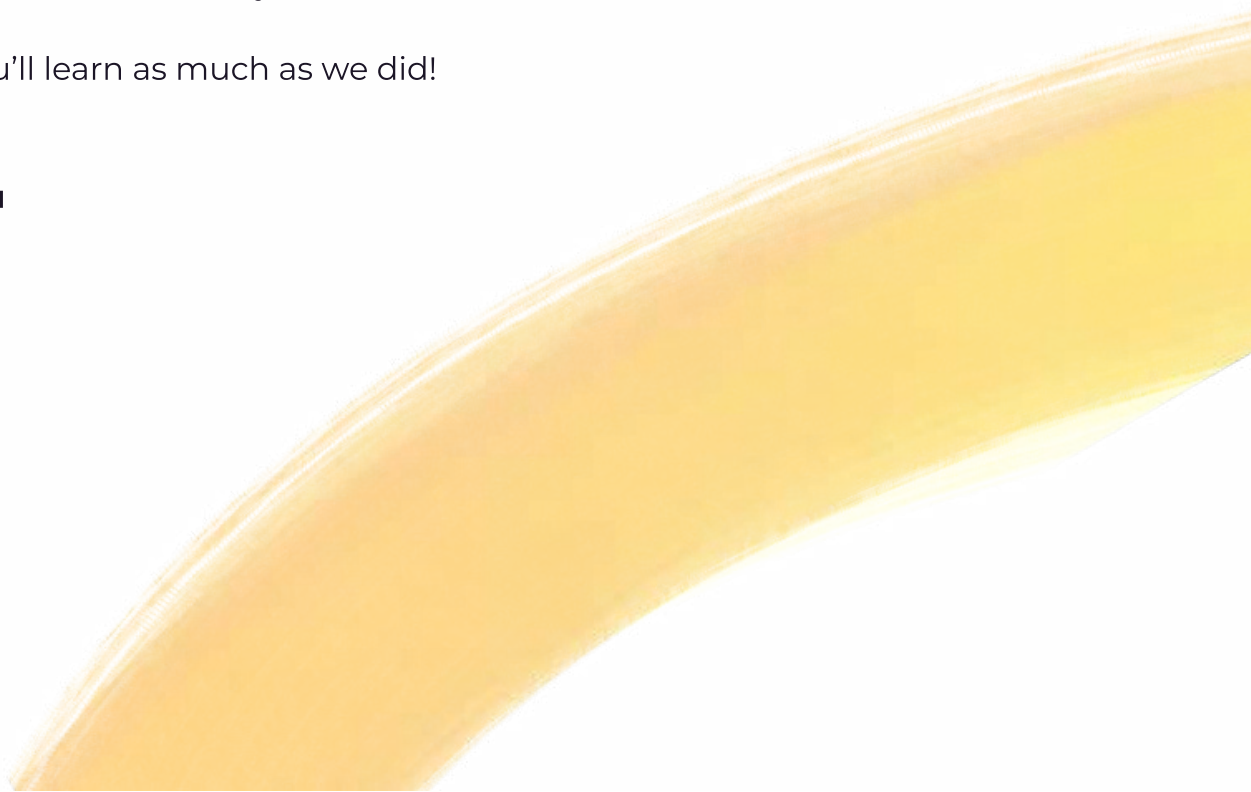


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Meet our panel of experts



Tara Bennett

Director, Resource Management at Code and Theory

Resource management veteran, Tara, keeps on top resource planning and profits at Ad Age's Business Transformation Agency of the Year.



Shantal Gonzalez

Project Director at One Story Branding

Fearless PM in high-stakes projects, developing and overseeing project strategies to increase performance and meet demands for clients like Smirnoff, Verizon, and ASOS.



Jordan Schroeder

Executive Director of Resourcing and Creative Services at TBWA\Chiat\Day

Jordan's knowledge of agency processes and interpersonal comm skills are unparalleled as she's managed over a hundred Creatives on multiple accounts.



Kennen Sisco

Global Director of Corporate Marketing at Illumina

Kennen's worked for iconic global brands like YETI, Whole Foods, GoPro, and Illumina and at several top-tier creative agencies.



Nytisha Vinson

Senior Producer at Code and Theory

With over 20 years of experience in digital project management, this certified CSM is a force to be reckoned with.



Aleks Zhavoronkova

Integrated Delivery Lead at Ogilvy

With a passion for creative work, Aleks has spent the past 20 years delivering projects for the biggest agencies in the game.

What's revenue-driven resource management?

Revenue-driven resource management is a strategic approach to optimize resource allocation to drive revenue growth.

By aligning the resource management strategy with revenue goals and leveraging data-driven insights from resource management tools, agencies can maximize the return on their investments and hit their financial goals.

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tell-tale signs of unhealthy resource management

You can't fix it if you don't know it's broken.

Identify the signs of an unhealthy resource management workflow and resolve issues before they turn into bigger problems.

1

Allocation issues

Agency life is competitive and changeable, which means resource allocation issues crop up regularly. Overallocation, underutilization, and resource hogging are often part of the daily battle. If you don't manage these well, it will lead to burnout, missed deadlines, and quality issues.

2

Inconsistent prioritization

We get it—plans change. But if tasks are frequently reprioritized without clear rationale or alignment with strategic objectives, you'll soon have to deal with confused team members, project delays, and frustrated clients.

3

High employee turnover rates

Agencies are notorious for their high turnover rates. While the reasons for that are many, the resource management side of things can be fixed. For example, that means no more unreasonable workloads, insufficient support, and inadequate training.

4

Scope creep

Scope creep isn't always immediately noticeable (hence the name). But if projects consistently exceed their planned scope, the repercussions you're looking at are strained resources and increased costs—meaning your revenue will suffer.

5

Missed deadlines

You'll always want to keep an eye on project milestones and deadlines across all your projects. Because if projects frequently miss deadlines or fail to meet deliverables—it's time to review your resource strategy.

6

Lack of transparency

Lack of transparency is a killer in any context. But if resource allocation decisions are consistently made in the dark, it'll lead to frustration at best, and distrust at worst.

7

Budget overruns

Are your projects burning hot? If projects consistently exceed allocated budgets due to poor cost estimation, ineffective resource allocation, or uncontrolled scope changes—you've got serious problems to tend to.

8

Poor quality deliverables

It all comes down to this. Once the work is in front of the client, does it meet expectations? If deliverables consistently fail to meet quality standards due to insufficient resources, inadequate training, or rushed timelines, your client relationships will suffer, and ultimately, so will your bottom line.



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Communication breakdowns

It's not always easy to stay on top of communication when things turn on a dime, client feedback throws a spanner in the works, or complete 180s are needed. But if departments or teams operate in silos, you risk ending up with duplication of effort and missed opportunities for collaboration.

10

Lack of innovation

Seeing a lack of innovation? Idea drought? Writer's block? It's time to review how your team spends their time. Because if people are constantly allocated to routine or low-value tasks, it will stifle creativity and opportunities for innovation.

11

Resistance to change

Struggling to get buy-in? Whether we're talking about the adoption of new processes or tools that could improve resource management workflows, resistance to change might be rooted in a bigger issue—fear of failure.

12

High stress levels

Agency life is no stranger to stress. Excessive workloads, unrealistic expectations, and inadequate support can lead to burnout. To no one's surprise, employee burnout has a detrimental effect on revenue. Put employee health first, and a healthy bottom line will follow.

Turn allocation chaos into creativity: Kennen's top tip for downtime



Allocation issues happen to the best of us. But underutilized resources don't have to just sit on the bench.

Kennen Sisco, Head of Global Corporate Marketing at Illumina, shares how to make the most of downtime.

During periods of downtime, there's a unique opportunity to dive into passion projects that spark creativity.

For example, these moments offer a prime chance to address business challenges through mini hackathons lasting 48 hours, where we would brainstorm innovative ideas or concepts. Some of these ideas may even become pitches for clients or stakeholders.

My recommendation is to seize underutilized opportunities and leverage them to showcase work to build inspiration.





Balancing client deliverables and employee well-being

With both clients and employee well-being top of mind, at New York based agency Code and Theory, the CCO has mandated that you can't book a resource for less than 10 hours a week.

Tara Bennett, Director of Resource Management at Code and Theory sheds more light on the approach.

Being realistic, if someone has five hours of meetings and you think that's all this person is required to do, they're still going to end up having to do another five hours of research or work on top of that.

So if someone tries to book someone for 15 hours on a project, we're like "Nope, we're gonna bump it up to 20 hours."

We do a lot just nudging things up a little bit so that we can give people the space and the bandwidth to actually do a good job. We want everyone to have the time and ability to think critically about the work, rather than having to scramble across a bunch of different projects.

This is why our CCO mandated that you can't book time on any resource that's less than 10 hours a week.

Also, generally speaking, we don't like to give anyone more than three projects ahead of time. But it's the 10-hour rule that effectively helps us preventing people from getting burnt out.

5 undisputed criteria for revenue-driven resource management

Revenue-driven resource planning means to always have long-term revenue top-of-mind.

That starts with these five criteria.

1 Tailor your team

What's often missing in the traditional agency model, is looking at each pitch, problem, or proposal with a fresh pair of eyes and asking yourself: how many people are needed to solve this problem? What experience do they require? What skills do they need?

The idea is to build an intentional team that strategically aligns with the project goals. If you don't, you might end up with costly feedback rounds, project delays, and budget overruns.

2 Let data lead the way

People are an agency's biggest expense. So it's no surprise that effective resource allocation leads to cost savings. But that requires data.

Your resource management tool needs to enable you to make data-driven resource allocation decisions across the project life cycle.

A static resource allocation strategy is a project killer.

3 **Keep your eyes on performance**

Every project requires you to establish key performance indicators (KPIs). Without them, you have no idea how you're tracking toward project goals and revenue generation.

When it comes to resource allocation, you'll want to keep a close eye on metrics like billable resource utilization, forecasted vs actual hours worked, and revenue per resource to make sure your agency is operating at peak efficiency.

4 **Stay customer focused**

Effective resource management strategies aren't just about assembling the right team for the job. It actually starts with—surprise, surprise—the client.

All too often, the higher ups are sent in to pitch and win the business. But once the deal is sealed, they're nowhere to be seen. While this can lead to frustration for the client—it's actually an allocation issue.

Give your executives more time to get their hands dirty, and output will increase in both quality and speed.

The result? Healthier margins.

5 **Invest in technology**

Investing in the right tools starts with defining your processes and workflows. This is what will ensure smooth implementation and adoption of new tools, minimize project disruptions, and maximize the ROI of your technology investments.

Remember this: *teams first, tools second.*

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If your agency is required to use certain tools, you may essentially be attempting to implement a high-quality tech stack within a dysfunctional culture that hasn't been addressed first.

All too often, the tools get the blame rather than fixing what's actually broken—processes and workflows.



Kennen Sisco

Global Director of Corporate Marketing at Illumina

The path to project profitability: Shantal's top 3 criteria



Seasoned Director of Project Management, Shantal Gonzalez, knows a thing or two about running profitable projects.

During her career in project management, which spans more than two decades, she's identified three crucial criteria when it comes to ensuring project profitability.

1

Staffing

Ensure your company or team is set up for success with the right talent. Your staffing plan has to align with projections based on both active and upcoming projects.

2

Forecasting

Ensure your resources are scoped properly and set up with the right tools.

Identify your phases and the resources needed for each phase. But also bear in mind who will lead from inception to completion, then allow yourself to sunset resources that are no longer needed.

3

Risk management

Make sure you're looking at the bigger picture and work on foreseeing potential blockers throughout the project.

For example, did the initial ask change and require additional support to keep the project on time? Does your plan allow for additional support? Maybe you don't need additional support throughout the project lifecycle, but only for a specific time frame.

The long and short of it? **Learn to pivot quickly.**

6 strategies for revenue-driven resource management

1 Don't compromise on your tech stack
People and processes come first. Once you've got that figured out it's time to invest in the tools that will help you optimize your resource planning practices. You'll need a full overview of resource availability, project timelines, and workload distribution to enable better planning and utilization, and ultimately—increased revenue.

2 Implement time tracking
Timesheets may not be at the top of anyone's list of favorite things to do, but it's necessary to have an accurate understanding of how your team spends their time to identify inefficiencies and optimize resource allocation as needed.

3 Focus on high-value clients
Be ruthless in prioritizing projects based on client value and potential for revenue growth. Then put your best talent on those accounts. Focusing on nurturing these relationships will pay off in the long run.



Building trust with your team (and clients)

At TBWA\Chiat\Day, Jordan Schroeder, Executive Director of Resourcing and Creative Services, says it's all about understanding your creatives and building trust with each of them to ensure both the client and creatives are happy with the result.

I focus on the skill sets of every individual. So skill sets, managing workloads, how much somebody can and cannot take on at their level, and how they work with other people.

For me, taking the time to learn about each creative will help everyone on the team in the long run. Without trust, you're putting team mentality at risk and the work can suffer. But if you build trust from the beginning, you will also build a healthier team atmosphere, which—ultimately—will lead to better work and better client relationships.

4 Embrace agile resourcing

Day-to-day resourcing needs often look different from what was forecasted. The more more projects, the more moving parts—this requires an agile approach to resourcing.



Agile allocation at Ogilvy

At Ogilvy, Integrated Delivery Lead Aleks Zhavoronkova, keeps a close eye on allocation and utilization, as one of her main KPIs is to reduce servicing and freelance costs.

I do a forecast of allocations and staff planning to see what the servicing cost is. But because of the nature of the work, there's a lot of movement. Like any bigger organization, there are a lot of stakeholders that need to approve things. So while you have your master plan, you need to manage it almost daily with the teams to find solutions.

We're not actively changing the weekly allocation plan, but we manage any unforeseen scenarios and sense check daily. As a rule of thumb, by 4.30 pm, everyone should know what they're working on the next day.

5 Focus on outcome over hours

Billable hours are important. But outcome is even more important. Because if your client isn't happy with the end result, they might go shopping for a new agency. So keep the lines of communication open between your teams and clients to make sure they're on the same page.

6 Do regular check-ins with your team

Establishing regular check-ins and encouraging open communication between the team and client is the foundation for a strong relationship. A happy team is a productive team, which leads to better outcomes for the client.

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No matter how badly your clients need to meet a deadline, they will always appreciate you being upfront, honest, and transparent with them.



Nytisha Vinson

Senior Producer at Code and Theory

The balancing act: Keeping clients and teams happy



Nytisha Vinson, Senior Producer at Code and Theory, knows both the account side and project side of an agency. Over the years, she's learned how to protect her team, keep clients happy—and stay within budget. So what's the secret?

We always want our clients to be happy, after all, they're our bread and butter, the reason we're here. But if your internal team isn't happy, then the quality of work will suffer.

While we want our clients to be happy, I also need to protect my team, because they're the ones doing the work and trying to figure things out. So if my team is being misused or taken advantage of by the client, then a conversation needs to be had, because that's not okay.

No matter how badly your clients need to meet a deadline, they will always appreciate you being upfront, honest, and transparent with them.

Have a conversation and then figure out a solution together, rather than saying what they want to hear.

When situations like that happen, you immediately need to bring the team together and figure out their *true capacity*. Not the numbers you see in your tools, but actually understanding how busy your team members are.

So, for example, if someone thinks that something can't be done for another four weeks, they need to put their hand up and say that.

Because as the PM, I need to take that to the Account Manager or to the client in order to have an informed conversation.

It's about cultivating trust and open communication with your team from the very start. That way they know when I ask these questions, they just need to be straight with me because we'll figure it out. But I need to know the facts.

In the end, if we're honest and transparent with both our teams and clients, we'll build trust from end-to-end. Ultimately, that's what leads to profitable projects and lasting client relationships.

What to look for in an agency resource management tool

While choosing your resource management tool doesn't come down to just features alone, it's a good starting point to assess the feature set against your agency's needs. Get started with these.

Feature	How it helps agencies
Planning and scheduling	
Schedule view	View team availability in one place to easily spot allocation issues
People and resources view	Organize your team and resources based on project needs
Project and client view	Get an instant overview of how teams and resources are distributed
Billable vs. non-billable hours	Track billable vs. non-billable hours to increase time spent on client work
Utilization rates	Track and optimize utilization rates to balance workloads
Booking approvals	Protect the time of your most in-demand people
Multiple booking types	Choose booking type based on project needs
Filter and search	Quickly find specific skills to match talent against tasks
Activity log	Track changes made to schedules and bookings over time
Time zone support	Manage team members across multiple time zones with ease
Calendar sync	Connect to external calendars to see all relevant events in one place
Leave management	Manage any type of employee absence, including PTO and sick leave
Clash management	Prevent overbooking and scheduling conflicts across projects and teams
Time tracking	
Timesheets	Track time spent across projects and stay on top of project budgets
Pre-filled time entries	Reduce time spent completing your timesheet
Bulk log	Log your week in one click based on pre-filled time entries
Data export	Analyze timesheets for resource optimization, budgeting, and billing
Reporting	
Reports	Get a clear breakdown of billable and non-billable time across people, resources, projects, and clients so you can analyze project profitability
Data export	Analyze and share reports with relevant team members and departments to optimize for revenue



Resource
Guru

About Resource Guru

Resource Guru is the resource scheduling and time tracking tool that puts both people and projects first.

Agencies like VML, Ogilvy, and M&C Saatchi trust us to stay on top of performance and profitability.

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