

The Resource and Capacity Planning Playbook for PMO Leaders

What resource data to track so you can make staffing decisions, prevent overload, and confidently deliver projects.





The person who looks available is not always available.

It is Monday morning. A project has been approved. Leadership wants to know if it can start next month.

The PM checks the schedule and sees several people with availability. The department manager says they are already committed elsewhere.

One person will be on leave. Another has the right role but not the required skill. A third is technically available, but assigning the work would overload them in another system.

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- The project schedule shows demand, but not complete availability.
- The resource directory shows people, but not all of their commitments.
- Development tools show work in progress, but not the wider portfolio.
- Paid time off reduces availability, but may never make it into the project plan.
- Proposed work and operational work may not appear anywhere.
- Actual effort is rarely used to improve the next plan.

This guide helps PMO leaders identify the resource data required for trustworthy capacity planning, understand how those data points must connect, recognize where capacity processes break, assess their current maturity, and build a resource and capacity backbone that supports more realistic commitments.





Move 1:

Don't start with utilization; start with the decisions.

The mistake many organizations make is starting with a single number: a utilization percentage, a headcount total, an open-hours report. Those numbers matter, but only because they help answer real staffing decisions.

For PMO leaders, the goal is not to collect more data. The goal is to help leaders make better decisions using that data. Before you build another workload report, start with the questions leadership is already asking:

Do we have enough capacity to deliver the committed work?

Can we start this new project when requested?

Which people, roles, or teams are becoming bottlenecks?

Who has the right skills and availability for this assignment?

Who is overallocated now, or will be soon?

Where do we need to hire, contract, or cross-train?

No single capacity percentage answers these questions.

"Can we start the project?" requires the proposed schedule, expected effort, required roles and skills, availability of suitable people, current assignments, leave, operational commitments, planning-stage demand, and the other work already competing for those same people together, not one at a time.

The data lives in separate systems — an HR system, Jira, a work management tool — but it can't stay siloed there. A person can look available in the project plan, fully committed in a department spreadsheet, and different again in Jira, depending on which system you ask.

The first step is to define the questions your PMO must be able to answer consistently. Once the questions are clear, the required data becomes much easier to identify and connect from the systems you already have.

Resource planning is not just a staffing spreadsheet. It is a connected decision system.





Move 2: The resource and capacity model

Every capacity decision depends on the same connected model.

FOUNDATION

- **People, roles & skills** — Who exists to do work
- **Departments & pools** — Where capacity is owned



SUPPLY

- **Schedules & availability** — When someone can work
- **Capacity & utilization** — Realistic assignable time
- **Leave & non-project work** — What reduces it further



DEMAND

- **Effort, timing & priority** — How much, when, how urgent
- **Planned allocation** — Supply committed to demand
- **Future & placeholder demand** — Before it's approved or named



DECISIONS

- **Actual effort & utilization** — What really happened
- **Staffing gap** — Demand exceeds qualified supply
- **Which work wins?** — Rebalance, delay, hire, contract

Each layer produces information the next depends on.

Foundation defines who could ever be assigned. Supply defines how much of their time is realistically usable. Demand defines what's competing for that time, when, and how urgently. Decisions determine which commitments get the capacity that exists — because the end question is never just "can we rebalance," it's "which work deserves the constrained capacity we have."





Move 3:

Track the capacity building blocks every PMO needs

Once you understand the resourcing data model, the next step is to ask three questions: Do we capture this? Where does it live today? Is it connected to the rest of the resource picture?

12 Capacity Data Points to Track

01

People

FOUNDATION

WHAT IT IS:

The individuals and non-person resources (employees, contractors, vendors, equipment, rooms) available to perform work.

LEADERSHIP QUESTION IT ANSWERS:

Who can perform the work?

IF IT'S MISSING:

Capacity is discussed in totals without knowing who can actually be assigned.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- HR system
- Resource spreadsheet
- PM tool user list

02

Roles & skills

FOUNDATION

WHAT IT IS:

The function a resource performs and the capabilities or experience required for the work.

LEADERSHIP QUESTION IT ANSWERS:

Who is qualified, not just free?

IF IT'S MISSING:

Staffing becomes name-based and dependent on whoever managers already know.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Resource spreadsheet
- One manager's head
- HR system

03

Departments, teams & pools

FOUNDATION

WHAT IT IS:

The organizational structures through which capacity is owned, reviewed, and shared.

LEADERSHIP QUESTION IT ANSWERS:

Where does capacity exist, and who controls it?

IF IT'S MISSING:

Cross-team planning depends on individual managers reconciling separate lists.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Org chart
- HR system
- Spreadsheet

04

Schedules & availability

SUPPLY

WHAT IT IS:

Standard work patterns, part-time schedules, regional calendars, and capacity start/end dates — when someone is actually part of usable supply.

LEADERSHIP QUESTION IT ANSWERS:

When is this person actually part of available supply?

IF IT'S MISSING:

Every report assumes everyone has the same schedule for the whole planning horizon.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- HR system
- Personal calendars
- PM tool

Continued on next page...





05

Capacity & utilization target**SUPPLY****WHAT IT IS:**

Total working time available, adjusted for how much of it should realistically be assignable to project work.

LEADERSHIP QUESTION IT ANSWERS:

How much of a person's time should we expect to allocate?

IF IT'S MISSING:

Organizations treat 100% of working hours as project-assignable.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Spreadsheet
- A manager's judgment

06

Leave & non-project work**SUPPLY****WHAT IT IS:**

PTO, holidays, support work, meetings, administration, and business-as-usual responsibilities.

LEADERSHIP QUESTION IT ANSWERS:

What reduces usable project capacity?

IF IT'S MISSING:

People appear free on paper while carrying invisible commitments.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- HR/PTO system
- Spreadsheet
- Nowhere

07

Project demand & requirements**DEMAND****WHAT IT IS:**

How much effort the work requires, when it's needed, how important it is relative to competing demand, and what roles or skills it takes.

LEADERSHIP QUESTION IT ANSWERS:

Do we have the right capacity, not just enough capacity — and where does it rank?

IF IT'S MISSING:

Availability in October doesn't solve a shortage in August — and without priority, capacity gets balanced instead of protected for what matters most.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Project plan
- Intake form
- Someone's head

08

Planning-stage & future demand**DEMAND****WHAT IT IS:**

Expected work that has not yet become an active, approved project.

LEADERSHIP QUESTION IT ANSWERS:

What will capacity look like after probable work is approved?

IF IT'S MISSING:

Every approved project creates an unexpected staffing crisis.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Intake spreadsheet
- Sales pipeline
- Nowhere

09

Placeholder demand**DEMAND****WHAT IT IS:**

Demand represented by role, resource type, department, or skill before a named person is assigned.

LEADERSHIP QUESTION IT ANSWERS:

What resources will we need even though staffing isn't final?

IF IT'S MISSING:

Demand disappears until the organization is already expected to deliver it.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- PM Tool
- Nowhere

10

Planned allocations**DEMAND****WHAT IT IS:**

The amount of a resource's time expected to be consumed by a project, task, or period — top-down or bottom-up.

LEADERSHIP QUESTION IT ANSWERS:

Where is available capacity already committed?

IF IT'S MISSING:

Managers see assignments but not how much workload they represent.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- PM Tool
- Allocation spreadsheet





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Actual effort, workload & utilization**DECISIONS****WHAT IT IS:**

What people actually spend, what they're currently carrying, how effectively capacity is being used, and how reality compares with the plan.

LEADERSHIP QUESTION IT ANSWERS:

Are people doing what the plan assumed, and how busy are they really?

IF IT'S MISSING:

Capacity planning never learns from execution. The same unrealistic estimates repeat every project.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Timesheet system
- Jira/Azure DevOps
- PM tool

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Staffing gap & response**DECISIONS****WHAT IT IS:**

The difference between required demand and available qualified capacity and the decision it forces.

LEADERSHIP QUESTION IT ANSWERS:

What must change for the organization to deliver?

IF IT'S MISSING:

Reports identify overload but never turn into a hiring, reassignment, or timing decision.

☐ Capture it? ☐ Connected? ☐ Trusted?

WHERE IT LIVES:

- Meeting notes
- A manager's judgment
- Nowhere

Where to start

You do not need all twelve building blocks on day one. Adopt them in the order of the resource data model.

- 1. Establish the foundation** (Who do we have?)
People, roles, skills, departments, teams, pools.
- 2. Connect available supply** (When are they really available?)
Schedules, capacity, utilization targets, PTO, non-project work.
- 3. Connect work demand** (What is competing for capacity, and what matters most?)
Effort, timing, priority, role requirements, planned allocations, planning-stage and placeholder demand.
- 4. Close the loop with execution.** (Are our assumptions improving?)
Actual effort, utilization, staffing gaps, workforce decisions.

The goal is not to account for every minute. The goal is to make commitments based on a resource picture that is complete enough to trust.



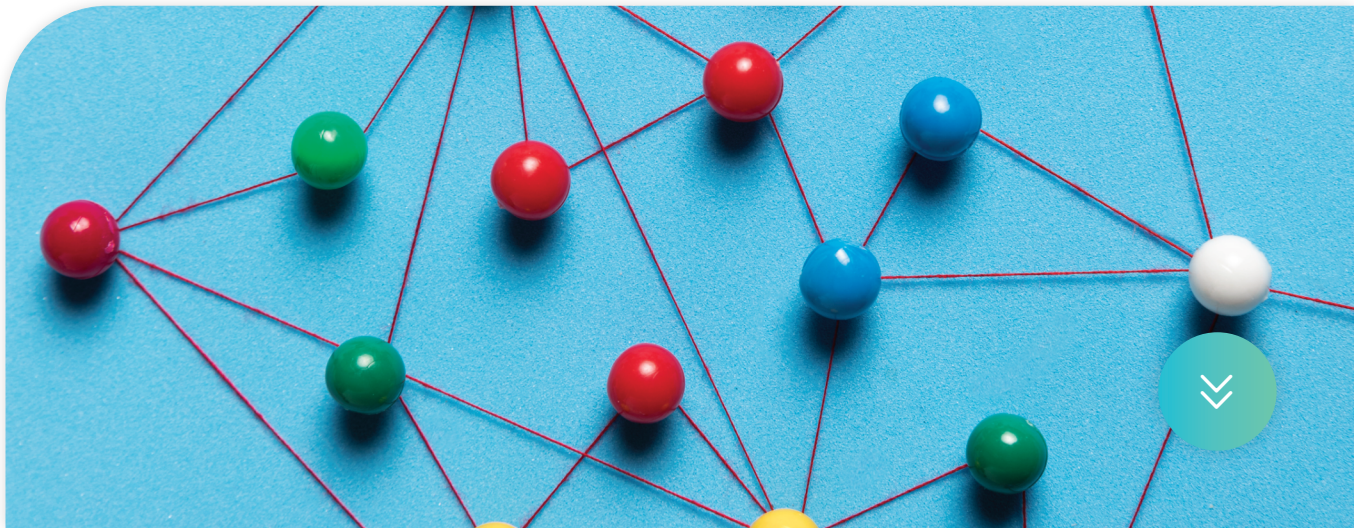


Move 4: Connect demand to capacity before you commit

Collecting the twelve building blocks is not enough.

Most organizations already have many of these numbers somewhere. The problem is that the data stops connecting as approvals, dates, and staffing promises are made.

- If proposed work is not connected to future demand, the organization approves work without understanding the staffing impact.
- If project schedules are not connected to resource allocations, the timeline moves but the capacity forecast does not.
- If availability is not connected to skills, a resource may look free without being qualified for the work.
- If PTO and non-project work are not connected to availability, a person may look free during time they will not actually spend on project work.
- If work in Jira or Azure DevOps is not connected to the portfolio, development teams may look available from the PMO's view while carrying full delivery commitments elsewhere.
- If planned effort is not connected to actual effort, the same unrealistic estimates repeat project after project.
- If priority is not connected to allocation decisions, capacity gets balanced by convenience instead of protected for what matters most.





Two stubborn failure patterns

Invisible work.

People are carrying commitments that never appear in the capacity system: business-as-usual work, support, unplanned requests, meetings, work tracked in an external system, shadow projects, informal leadership responsibilities. These are real, costly, and nowhere in the report.

False precision.

The report shows a person at 72% utilization. The number is exact. It's also built on incomplete estimates, missing PTO, invisible operational work, or outdated assignments. So the picture underneath is not exact at all.

This is why another workload dashboard usually does not solve the problem. A dashboard can only show the data it can reach. If skills, PTO, priority, and work in external systems live in separate places without a reliable connection, the dashboard becomes another reporting layer on top of disconnected information.

Can leadership answer the capacity question now?

Not after exports.

Not after a manager's spreadsheet.

Not after a planning meeting.

With one connected capacity picture.

Connection is what turns data into a capacity story the PMO can defend. When the data is connected, leaders can see how proposed work became visible demand, how demand became a staffing plan, how a plan became an assignment, how actual effort revealed a gap, and how everything rolls up into portfolio-level visibility executives can trust.

That is the difference between collecting resource data and building a resource and capacity backbone.





For resource data to actually work, it can't just sit in different places.

Availability, skills, PTO, assignments, and demand all need to connect to each other in one place so the numbers can be trusted, not just collected.

Here's what that looks like in practice.

Say an integration pulls hours from Jira into a report. Now you can see the hours. But you still can't tell if that person is overloaded because the report doesn't know what else they're assigned to, whether they're about to go on PTO, or how urgent the work is.

Every system you add without connecting the data creates another relationship someone has to maintain by hand.

The hours showed up. They just didn't bring their context with them.

That's the real difference: *moving* data gets a number from one screen to another. *Connecting* data means that number still knows what it's related to once it gets there.

Every integration you add without connecting data becomes one more thing someone has to reconcile by hand.

Test your system

When a project manager assigns a task, does that person's availability, PTO, workload, and portfolio-wide capacity update without anyone exporting data or checking a spreadsheet?

If the answer is no, your work management tool has likely reached its capacity limits.





Move 5: Recognize when your work management tool has reached its capacity limits

Work management platforms are excellent for organizing tasks, assigning owners, and supporting team collaboration. But organizing work is not the same as managing organizational capacity.





Signs You've Reached the Resource-Planning Ceiling

- ☐ Resource managers maintain separate allocation spreadsheets.
- ☐ A person can look available in one project while overloaded across the portfolio.
- ☐ PTO and non-project work are added manually before every review.
- ☐ Proposed projects aren't included in capacity until they're already approved.
- ☐ Skills and roles aren't considered when someone is selected for an assignment.
- ☐ Jira or Azure DevOps teams are missing from the capacity picture entirely.
- ☐ Schedule changes don't automatically update resource demand.
- ☐ Utilization is reviewed after overload occurs rather than forecast beforehand.
- ☐ Hiring requests rely on manager judgment instead of visible future demand.

Checked three or more? These are architecture problems, not effort problems.

None of these are effort problems. They are architecture problems.

The resource building blocks were never designed to work together in your current connections. The solution is not another dashboard, another export, or another integration. The solution is a resource and capacity backbone where people, skills, availability, PTO, demand, priority, and actual effort are connected from the beginning.

When the resource and capacity backbone is connected, staffing decisions become something leaders can trust instead of something a manager has to reconstruct every time a project gets approved.





Move 6:

Align the capacity picture to the people who need it

Different people need different answers from the same resource and capacity backbone.

PMO LEADERS

Key Questions:

Can the portfolio be delivered with current capacity? Which projects compete for the same constrained roles? Where should work be delayed or reprioritized?

Required Visibility:

Portfolio-wide demand, planning-stage projects, staffing gaps.

RESOURCE MANAGERS

Key Questions:

Who is overloaded? Who has capacity? Are assignments balanced fairly? Where do I need more people or different skills?

Required Visibility:

People, teams, skills, availability, PTO, utilization targets.

PROJECT MANAGERS

Key Questions:

Who can complete this task during the required dates? Will this assignment create overload? Can I replace an unavailable resource?

Required Visibility:

Capacity from the task list, assignment warnings, suggested resources.

EXECUTIVES

Key Questions:

Do we have enough capacity to deliver our commitments? Which initiatives are at risk from resource constraints? Where will hiring or contracting be required?

Required Visibility:

Demand vs. capacity trends, critical constraints, workforce gaps.

TEAM MEMBERS

Key Questions:

What am I expected to complete, and what's highest priority? Am I being assigned more than I can realistically deliver?

Required Visibility:

One cross-project work list, realistic assignments, notifications.

WORKFORCE PLANNING/HR

Key Questions:

Which skills will be needed, and when? Is the gap temporary or sustained? Should we hire, contract, or develop internally?

Required Visibility:

Role and skill demand by period, unfilled placeholders, gaps.

When the data is disconnected, each of these groups builds its own version of the truth and the versions disagree. When the backbone is connected, everyone is looking at the same numbers through different windows.





Move 7:

Can you trust your resource and capacity forecasts?

You have seen the data model, the twelve building blocks, and the ways connections break. Now assess where your organization stands. **Score your PMO below.**

Score each question: 0 = no, 1 = partially or manually, 2 = yes, automatically.

RESOURCE FOUNDATION & SUPPLY

- | | | | |
|---|---|---|---|
| 1) Do we maintain every resource with the correct role, department, schedule, and capacity? | 0 | 1 | 2 |
| 2) Can we identify people by the skills or resource types a task requires? | 0 | 1 | 2 |
| 3) Do PTO, holidays, and individual schedules reduce availability automatically? | 0 | 1 | 2 |

CURRENT WORK DEMAND

- | | | | |
|---|---|---|---|
| 4) Does every active project include realistic estimates, timing, and priority? | 0 | 1 | 2 |
| 5) Can we combine task-level demand with top-down allocations? | 0 | 1 | 2 |
| 6) Is business-as-usual and non-project work visible in the capacity picture? | 0 | 1 | 2 |

FUTURE DEMAND

- | | | | |
|---|---|---|---|
| 7) Are proposed and planning-stage projects included before they're approved? | 0 | 1 | 2 |
| 8) Can we represent demand with placeholder roles before named people are assigned? | 0 | 1 | 2 |



Score each question: 0 = no, 1 = partially or manually, 2 = yes, automatically.

EXECUTION & DECISIONS

- | | | | |
|---|---|---|---|
| 9) Are project managers warned before an assignment creates overload? | 0 | 1 | 2 |
| <hr/> | | | |
| 10) Can managers identify a qualified alternative based on fit and availability? | 0 | 1 | 2 |
| <hr/> | | | |
| 11) Can we model timing or staffing changes without altering the live plan? | 0 | 1 | 2 |
| <hr/> | | | |
| 12) Can leadership tell whether a gap requires reprioritization, delay, reassignment, hiring, or contracting? | 0 | 1 | 2 |

Your score

0-8 **Disconnected.** Resource information lives in separate schedules, spreadsheets, and manager knowledge. Start with the resource foundation and current demand.

9-16 **Partially connected.** You can see basic workload, but manual handoffs hide leave, planning-stage projects, or skill constraints. Focus on every question you scored 1.

17-24 **Connected.** Your organization can see demand and availability across current work. The next opportunity is future planning, scenario modeling, and workforce forecasting.

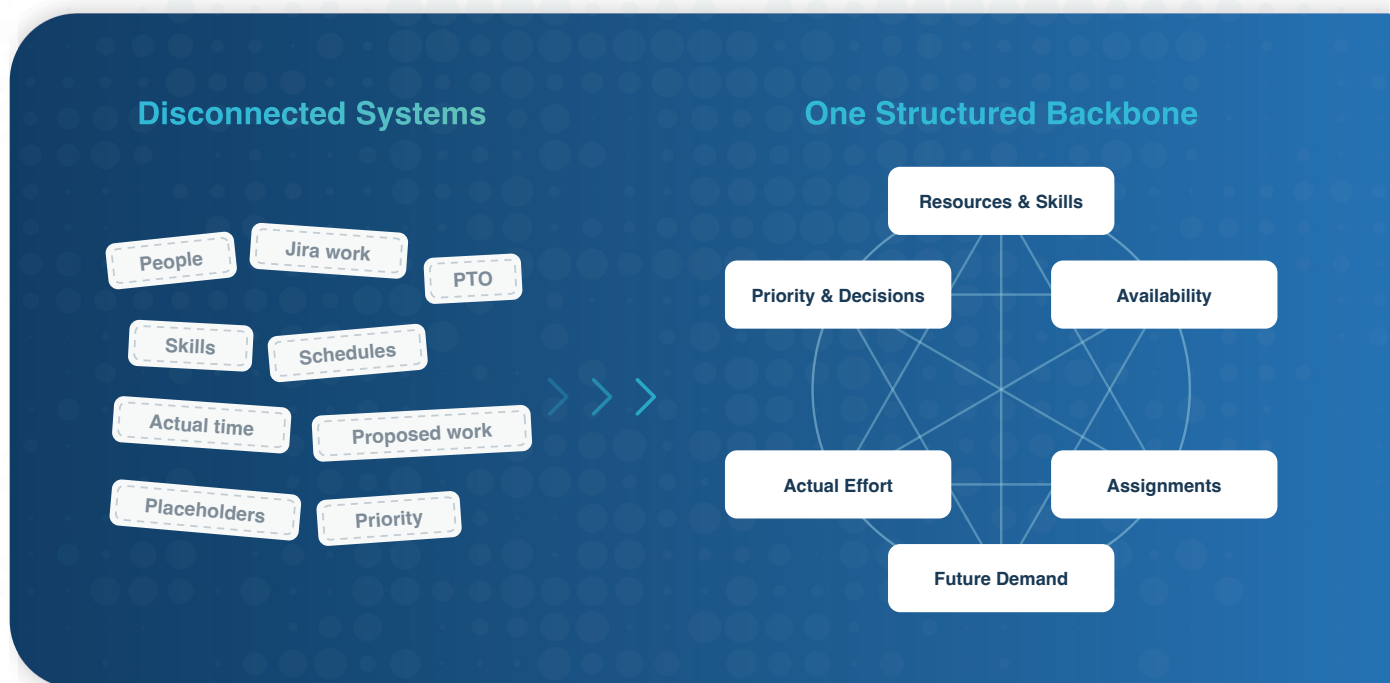
This is not a measure of how hard your resource managers work. It measures how much of the process is supported by connected structure rather than manual reconstruction.





Move 8: Build a connected resource and capacity backbone

You do not need another workload dashboard sitting on top of disconnected resource data.
You need a connected resource and capacity backbone underneath it.



A connected backbone doesn't force every team to plan work identically.

- Some teams use detailed task estimates; others use high-level weekly allocations.
- Development teams can keep working in Jira or Azure DevOps.
- Operational work can be represented through top-down planning.
- Proposed projects can use placeholder roles.

The backbone creates a shared structure through which every source of demand can be compared against the organization's real supply of people, skills, and time — and prioritized when they compete.





How Project Insight builds the foundation

Project Insight was designed around the structure of project data.

It does not treat people, skills, availability, PTO, demand, priority, and actual effort as unrelated fields. It connects them through the project, its tasks, resources, schedule, staffing plan, and reporting structure.

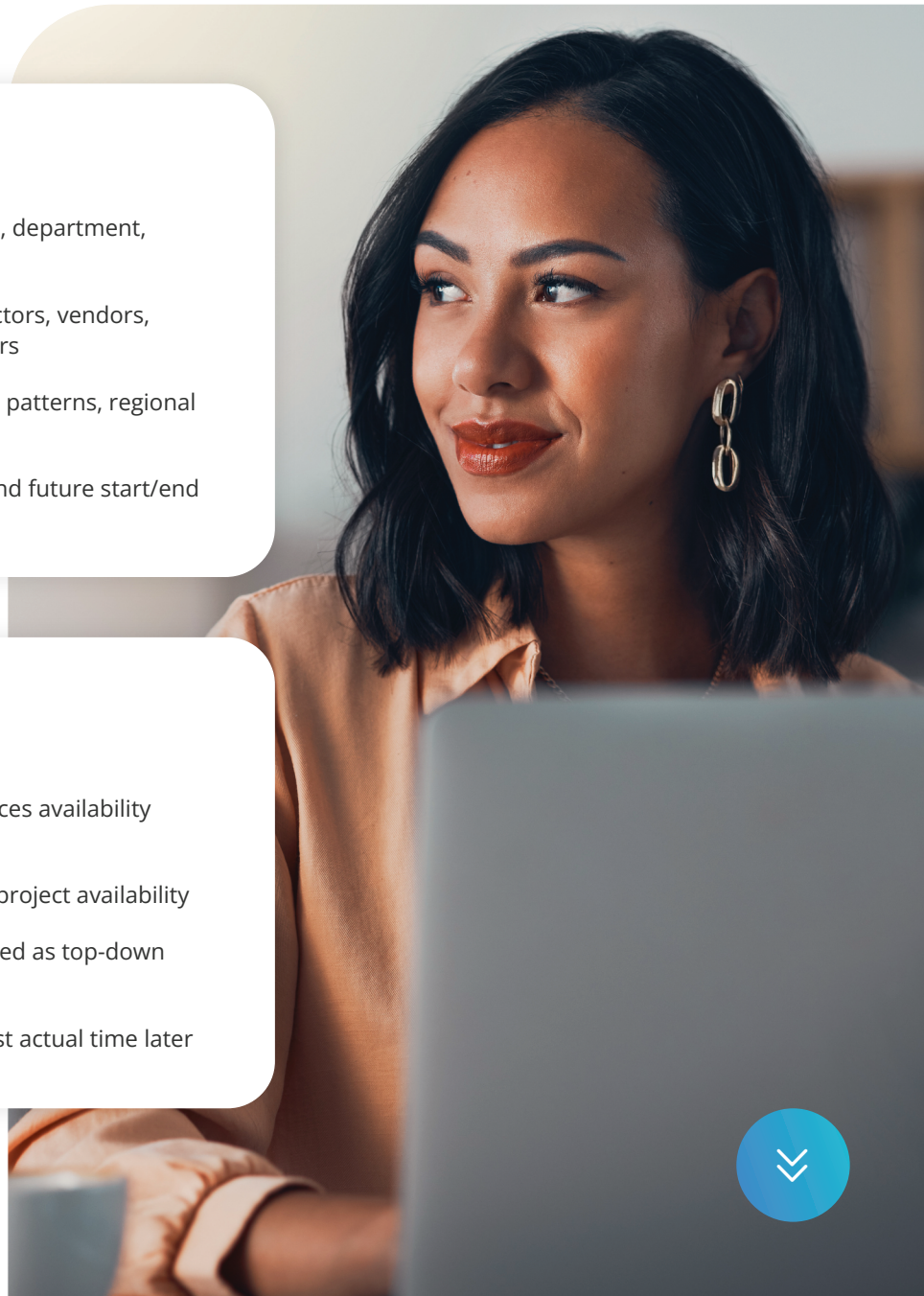
That gives teams the resource and capacity building blocks required across the project lifecycle.

A REALISTIC RESOURCE FOUNDATION

- Resources by person, role, skill, department, team, and pool
- Non-person resources: contractors, vendors, rooms, equipment, placeholders
- Individual schedules, part-time patterns, regional calendars
- Capacity percentages, limits, and future start/end dates

USABLE CAPACITY, NOT THEORETICAL CAPACITY

- PTO-aware planning that reduces availability automatically
- Utilization targets for realistic project availability
- Business-as-usual work modeled as top-down allocation
- Planned BAU compared against actual time later





Two ideas that change how a PMO plans

1 Top-down and bottom-up planning, in one picture

Bottom-up planning calculates demand from task duration, estimates, and dependencies. It is precise, but only as good as the detailed plan behind it.

Top-down planning lets a manager estimate high-level demand — 10 hours a week for eight weeks — without building every task first.

Many organizations end up managing top-down and bottom-up planning separately. Project Insight rolls both into the same capacity picture, so a detailed engineering plan and a rough estimate for early-stage work show up on the same report, side by side, without separate spreadsheets to reconcile.

2 Plan demand before you know who's doing the work

Placeholder resources let a PMO represent demand by role, skill, or resource type before a name is attached. That demand shows up in capacity reports immediately, instead of disappearing until the organization is already expected to deliver it. Placeholder planning is where the resource backbone connects directly to project intake: capacity gets tested before a project is approved, not discovered after.





Finding the right person, and testing before you commit



Suggest-a-Resource: fit, not just open hours

When a task needs a person, AI-assisted Suggest-a-Resource evaluates availability during the task dates, current workload, role, skill match, and department and then recommends alternatives that balance fit against busyness.

Capacity checks happen directly from the task list, so a project manager never has to leave the plan to find out who can actually take the work.



What-if planning, without touching the live plan

What happens if we approve this project? If it starts a month later? If a key person is unavailable? If we add a contractor? What-if scenarios let a PMO model each of these against real schedule and capacity data — comparing options, seeing downstream schedule effects, and supporting a hiring or approval decision — before committing to anything in the actual plan.

The least-busy person isn't automatically the right answer; the qualified person who has room is.





Work that lives outside Project Insight still counts



Detailed demand where it exists, an overlay where it doesn't

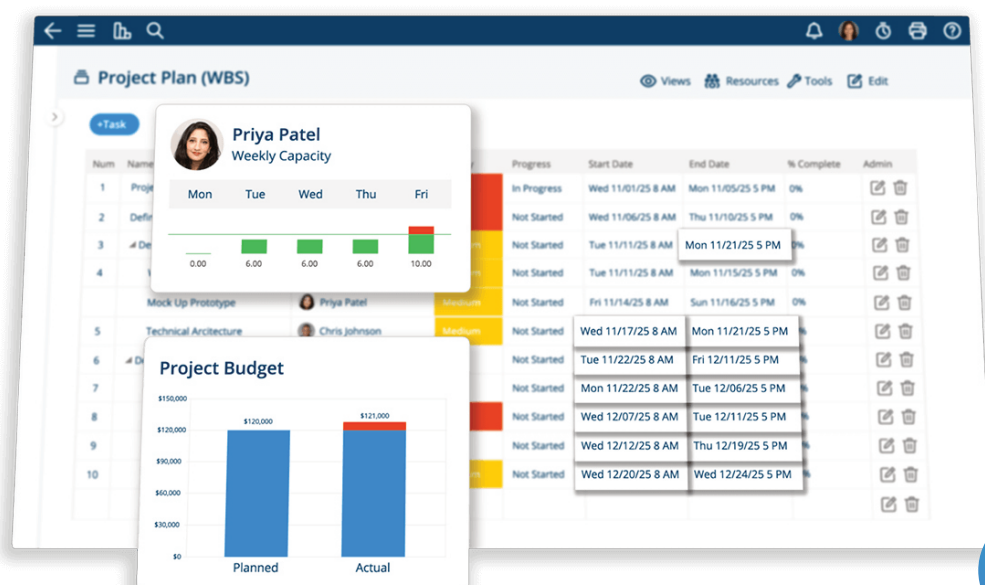
When effort is tracked in a connected Jira or Azure DevOps workspace, that work contributes directly to capacity reporting. When it isn't — and for many delivery teams it isn't tracked precisely — a manager can still represent the team's demand through a top-down overlay: "this team spends 40 hours a week on the sprint." That gives the PMO a way to represent real demand even when the source system does not contain detailed effort estimates.

CONNECTED SCHEDULING

- Intelligent scheduling moves dependent tasks — and their resource demand — together automatically
- Same underlying data across task lists, Gantt, planning boards, and reports

PORTFOLIO-WIDE REPORTING

- Roll-up views across projects, programs, portfolios, and departments
- Sort by remaining capacity, department, or project priority
- Real-time rebalancing with inline edits and drag-and-drop





The difference is not simply that Project Insight stores names, assignments, or capacity percentages. The difference is that those elements have relationships.

- When a task is assigned, it can connect to the project, schedule, person, role, skill, department, availability, and priority.
- When PTO is entered, it reduces availability during the same period scheduled work is creating demand.
- When a project date changes, connected resource demand moves with it.
- When a placeholder is replaced, future demand becomes a named assignment without rebuilding the plan.

A custom field can store "80% allocated." It cannot, by itself, explain which projects created the allocation, whether assignments overlap, whether the person has the right skills, or whether a contractor is needed.

AI cannot reliably say who should be assigned, which team will be overloaded next month, or whether a project can be approved unless it understands the relationships between people, roles, skills, schedules, availability, PTO, assignments, priority, and actual effort.

Project Insight's AI-assisted planning, scheduling, and what-if simulations work from that same connected resource data — not isolated numbers without the context behind them.

Why this matters when you're using AI

AI does not solve disconnected resource data. It exposes it.

AI cannot reliably answer questions such as: Who should be assigned? Which team will be overloaded next month? Can this project be approved with the capacity we have? Which roles or skills are becoming constraints? Does the gap require reassignment, reprioritization, delay, hiring, or contracting?

Useful AI analysis requires more than access to assignments or open hours. It needs to understand the relationships between people, roles, skills, schedules, availability, PTO, workload, project demand, priority, and actual effort.

Project Insight's AI-assisted planning, scheduling, resource recommendations, and what-if simulations work from that connected resource data—not isolated numbers without the context behind them.





What good looks like

When the resource and capacity backbone is connected, capacity planning stops being a manual reconstruction exercise:

Project managers check capacity while assigning work, not after.

- Proposed projects create visible demand before they're approved.
- PTO and operational work reduce availability automatically.
- Resource managers see overload across every project, not just one.
- Placeholder demand reveals hiring and contractor needs early.
- Schedule changes update the capacity forecast automatically.
- Leaders know what to approve, delay, reprioritize, hire for, or contract.

AI can analyze connected project data instead of trying to interpret scattered fragments.

That is the shift:

From workload reports built on incomplete assignments to confident commitments built on a connected resource and capacity backbone.

Let us help you connect your resource and capacity data.

A Project Insight specialist will show you how active work, proposed projects, schedules, assignments, PTO, operational commitments, roles, skills, priority, and actual effort can come together in one capacity command center.

See how Project Insight helps you understand who is available, what work is coming, where capacity is tight, and what needs to change before you commit.

Bring us one real capacity question.



Talk to a specialist