



COGNOTA

### Managing Your Team's Capacity

What is Capacity Planning?

Conclusion

**Everyone wants their team to be more productive.**

Benefits of Capacity Planning

Capacity Planning Challenges

Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning, and focused effort.

Paul J. Meyer



eBook

# The Training Manager's Guide to Team Productivity & Meeting Training Demand



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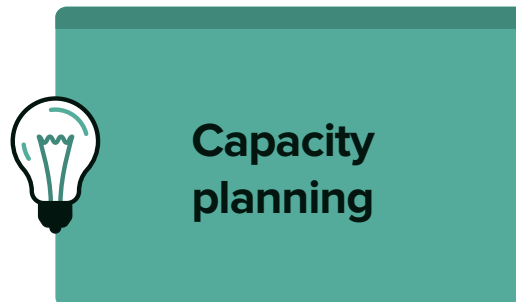


# Introduction

As executive understanding for the vital role of training in the organization continues to evolve and grow, L&D managers are faced with a dilemma: how can training teams keep up with the increasing demand for training? Especially if they are already under-resourced?

It's essential to find the balance between delivering on expectations in the organization and only taking on what your team can realistically achieve.

Training managers need to address three key areas to maintain an upward trajectory for L&D in their organization:





# What's the Problem?

## Team Productivity

When high demand is placed on your team and they're struggling to keep up, it's time to take a look at how to improve productivity.

Training teams are inundated with training requests, using disparate tools and technology, challenged with effective collaboration, and facing increasing pressure to produce higher volumes of training.

### The Learning Tech Stack

L&D teams have more choice than ever when it comes to selecting their ideal learning tech stack. But with that choice can come a lot of confusion about how to select (and use) the right tools and solution for your team.

Learning managers need to become fluent in learning technology and fully understand the role of each piece of the learning technology stack.

### Management Data & Insights

The simple truth is that you don't need micromanagement-level oversight into the individual tasks your employees are completing on a day-by-day basis. But you do need to understand:

- Your team's capacity
- Your available resources
- The demand for training



## The Problem in Numbers



**40%**

of project managers spend most of their time **micromanaging** employee responsibility



**File Sharing**

is the most requested project management software feature



**80%**

spend nearly half of the week on “rework” caused by **poor communication**



**83%**

of employees report feeling burnt out by a high volume of emails



# The 4 Characteristics of Productive Training Teams

Productivity encompasses many different aspects of your learning team's operations. So what does a truly productive training team look like?



## Collaborative

Collaboration is the cornerstone of team success, both overall as an L&D department and when it comes to individual training projects. Collaborative training teams:

- Communicate frequently, honestly, and clearly
- Feel welcome to contribute ideas and feedback
- Are transparent about their work and share it with others



## Results Driven

No matter how hard you and your team are working, training managers know that what senior executives really want to hear about is the bottom line. Results-driven teams:

- Align themselves with organizational goals
- Focus all activities towards achieving results
- Use specific measurements and indicators to track progress



## Empowered

None of these characteristics can be achieved if the training team is not properly empowered to do their best work. This means providing teams with:

- Clearly defined and optimized processes
- The right tools and technology
- The capacity and resources needed to meet training demand



## Valuable Business Partners

L&D's strategic value is on the rise, and productive training teams know that the closer they can work with their business partners, the greater their success. This means:

- Staying in touch with organizational training needs
- Correctly diagnosing training issues
- Consulting with SMEs, learners, and other stakeholders



**“Productivity is never an accident . It is always the result of a commitment to excellence, intelligent planning, and focused effort.”**

**Paul J. Meyer**



## Defining & Managing Your Team's Capacity

When your team is constantly working well beyond capacity, it slows down all projects and results in lower quality outputs. The training team suffers and so do the learners.



### 46% of Team Leaders

say hitting project deadlines is their biggest problem

The cause of these project malfunctions can range from demanding executives to strained budgets. But one factor that is common to nearly all of them is poor (or non-existent) capacity planning and resource management.







# What is Capacity Planning?

Capacity planning is the process of weighing supply (availability and skill sets of project contributors) against demand (how many projects you plan to undertake in a given time frame).

Capacity planning is a higher level task that assesses demand and helps you understand how much work your team should be taking on over a given time period. It's sometimes referred to as resource forecasting or demand planning.

Once you have a clear picture of the team capacity, perform the same analysis in relation to the demands on your team. It helps to determine if your training team has the necessary resources and skills to execute the projects they are being asked to complete.

During the capacity planning process, you'll be analyzing the available resources which include:



**Team availability  
(by hours)**



**Budget availability for  
those hours**



**The availability of  
specific skill sets at  
the team level**



The gap between the capacity you have and the capacity you need helps with high level decision making. Therefore, the result of your capacity planning exercise may be:



**Deferring  
certain  
projects**



**Hiring extra  
resources**



**Closing skills  
gaps with  
training**

Resource planning comes further down the line at the operational level. It's about coordinating resources and allocating them in the most efficient way possible between projects. Another term for this process is resource allocation.

At this point, you'll be allocating specific team members to different projects based on the skills and resource requirements of each project.

Capacity Planning	Resource Planning
What projects can we work on?	What projects are our resources working on?
Longer range view	Medium range view
Skills/team level focus	Resource focus
Demand vs. supply variance	Under and over utilisation reporting

Source: [Kelloo](#)



Proper resource planning helps your team make the most of personnel hours, skill sets, and budgets to avoid the underutilization or overutilization of resources. It's also about developing optimal timelines for different projects based on efficient resource allocation.

While the terms are sometimes used interchangeably, they are not the same. The processes, timing, and outcomes are different.

**Curious to see how well your training team is keeping up with demand? Try this interactive capacity gap calculator:**

**Calculate Now**

“Until we can **manage time**, we can manage nothing else.”

**Peter Drucker**



## Benefits of Capacity Planning

Training programs have more of a spotlight on them now than ever before. A successful training program impacts how appealing your organization is to prospective talent, job performance and satisfaction, and overall organizational performance.

Capacity planning and resource planning are critical to ensuring your L&D team is not taking on too much or too little and is making the most of available resources so these expectations can be met

## Saying “No”

Until you can communicate the capacity of your team and current workload in concrete numbers, your training team will continue to have more work than it can handle.

Executive management speaks in numbers, and capacity planning gives you the numbers to communicate your team's needs and the demands placed on them in a clear and concise manner.





## Getting What You Need

Having those hard and fast numbers also helps to:

- Irrefutably prove that you cannot make space for a new project
- Show the precise resource constraints your team is currently under
- Show exact figures for extra resources needed

When it comes time to request extra resources, you have already argued your case with your capacity planning figures.



## Prioritizing Workloads


If it's the case that extra resources will not be available, capacity planning can help management decide which projects to prioritize and which ones the organization can afford to shelve.

Resource planning helps L&D management assess how to most efficiently prioritize projects based on resource availability. If you're struggling to justify extra resources to executives or are finding resource waste amongst your team's activities, taking a closer look at capacity planning and resource planning can help.

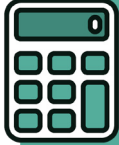


# Capacity Planning Challenges


Capacity planning is not without its challenges. So, before you start building a capacity planning and resource management model for your learning department, here are some common challenges to look out for:




**Data collection  
& maintenance**



**Calculations**



**Collaboration**



**Change**



# Data Collection & Maintenance

Capacity planning is about accuracy. It helps you to pinpoint exact resource requirements and availability. But precision takes a lot of something we have been slow to embrace in the learning industry: data.

Secondly, one of the trickiest parts of data collection is deciding the various levels of detail you'll need to accurately scope the L&D team's capacity and the resources required per training project.

Firstly, collecting the data you'll need to make capacity planning worthwhile is challenging for several reasons. The data is:

- **Not currently being collected at all**
- **Scattered, collected and/or stored across different systems**
- **Not granular enough**

**For your team, you'll have to decide at which level you'll assess capacity by:**

- Team
- Skill
- Role
- Individual team member

**For training requests, will you be assessing resource requirements by:**

- Time
- Project level and complexity
- Project phases
- Individual tasks per project

The more granular your data collection, the more work there will be to maintain it. However, granularity also means a higher level of accuracy for planning and analysis.



## Calculations

The type and granularity of data that you collect will also have a significant impact on how you go on to calculate capacity and demand.

It's often instinctual to turn to spreadsheets for data capture and calculations such as these. But what you end up with next is an unwieldy workbook with multiple sheets.

Your calculations may be working, but with such an unreliable system you cannot rely on the accuracy of the numbers produced.

Take this simple example of capacity Vs. demand. It only calculates available hours of staff members to complete training projects. A useful snapshot, but certainly not the full picture.

(Q2 2020)	Demand	Capacity	Availability
Active FTEs (headcount)	37.63	36	-1.63
Period Capacity (hours)	14,677	14,040	-637

But as soon as you start adding other elements into the mix, the calculations (and the data needed to make them) becomes infinitely more complicated.





## Collaboration

Lots of people have a stake in capacity planning for L&D. From the instructional designers fulfilling the project work to the learners waiting for the courses they have requested and all the levels of management in between.

Those on the L&D team in charge of capacity planning and resource allocation sit between the suppliers and consumers of learning experiences and must use capacity planning to manage expectations and maximize what the training team can deliver.

This means sourcing data from multiple places and combining it to get the best birds-eye view of training demand and the impact it's fulfilment will have on the organization as a whole.

You may find that the data you need from outside the L&D department either isn't collected or is maintained in a difficult format for your purposes.

Overcoming this challenge of collaborating over capacity planning is worth spending the time to overcome. The more complete and accurate picture you have of training demand and existing capacity, the more precise and valuable your resource management and allocation will be to various training projects.

**“If everyone is moving forward together, then success takes care of itself.”**

**Henry Ford**



# Change

The concept of change and its increasingly fast pace is a subject of much debate and conjecture, not just for L&D, but for the business landscape as a whole.

Today's speed of business throws a spanner in the works for many business processes, but for capacity planning, too much unforeseen change can be disastrous.

And yet that change is happening whether we like it or not.

Dynamic market forces and a highly competitive business environment are forcing organizations to be more agile in their approach than they have ever been.



## 71%

Frontline employees taking the initiative to drive change elevates the success of change initiatives to a whopping 71%

In terms of capacity planning, one of the challenges for L&D is to build a model that is highly responsive to these pivots in strategy and can provide accurate snapshots of your team's capacity as demand changes.

The more flexible and dynamically built your capacity planning model is, the more useful it will be in responding to inevitable change.



# Where Technology Comes Into It

For some time now, learning and development has been experiencing a deluge of new technology and tools to enable training teams to make the leap into online learning and digital content creation.

Most of the technology available (LMS's, authoring tools, etc.) focuses on the creation and deployment of learning. L&D have embraced these tools enthusiastically.

However, less focus has been placed on the elements of training development which really empower training teams to increase their productivity, so they can spend more time creating new learning experiences and less time on inefficient front-end processes.



**Training  
intake**



**Capacity  
planning**



**Project  
scheduling**



**Resource  
management**



**Team  
collaboration**

Instead, many training teams continue to use tools that are not purpose-built for L&D to manage essential processes such as training intake, capacity planning, project planning, and collaborative content design and course building. That's why challenges such as version control, team collaboration, and the inability to scale training across the organization persist.



**62%**

of high-performing companies use real-time document editing and file version control features



**40%**

of project managers spend most of their time micromanaging employee responsibility and answering questions over email



One company provided managers with improved workplace tools so their teams could improve productivity.



With over 30,000 managers, the company estimated an annual productivity increase worth \$12 million.



## Conclusion

Everyone wants their team to be more productive. But increasing productivity requires more than simply increasing workloads and demanding higher output.

Careful consideration of capacity planning, resource allocation, process optimization, and the right technology solutions are essential to meeting training demand without expecting the impossible from your team.

## The First and Only Learning Operations Platform for L&D Teams

Increase effectiveness by bringing the entire workflow, from intake to design, into the Cognota LearnOps platform. You'll save time, improve collaboration, and get data about team performance and learning needs across the organization, which disparate or stitched-together tools can't provide.

[Try It Free](#)

[Speak With Sales](#)





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