Empowering Decision Makers with Real-Time Resource Analytics

Achieving higher project throughput with smarter capacity planning

Available Resources

Backlogged Project

Reallocate

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PerceptiveAnalytics

COMPANY OVERVIEW

Financial AI Services

CXOs

$40M Revenue

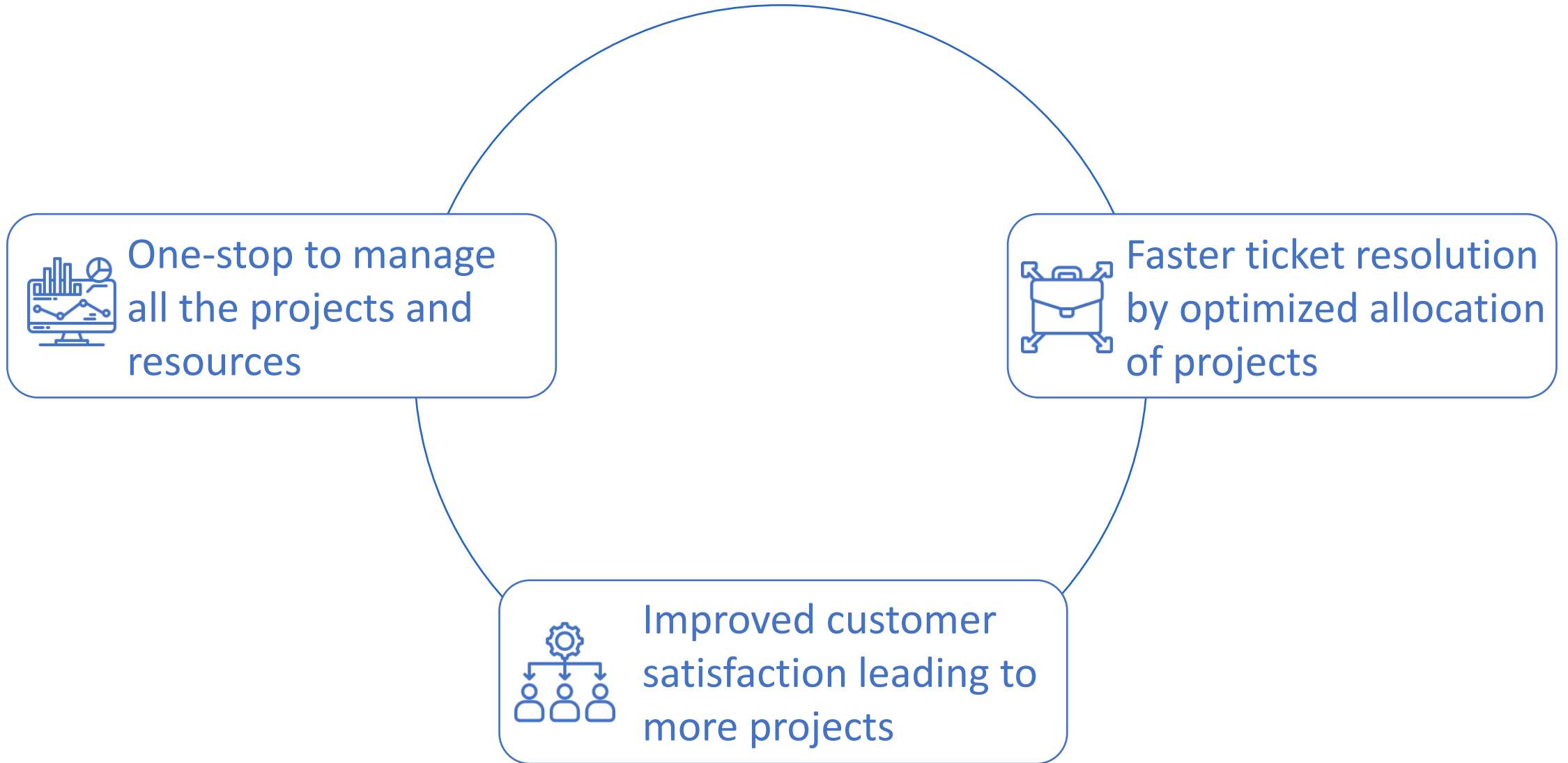100 Employees

OBJECTIVES

Track work done in active projects

Allocate work to the analysts efficiently

Identify contracts with a scope for expansion

BENEFITS

One-stop to manage all the projects and resources

Faster ticket resolution by optimized allocation of projects

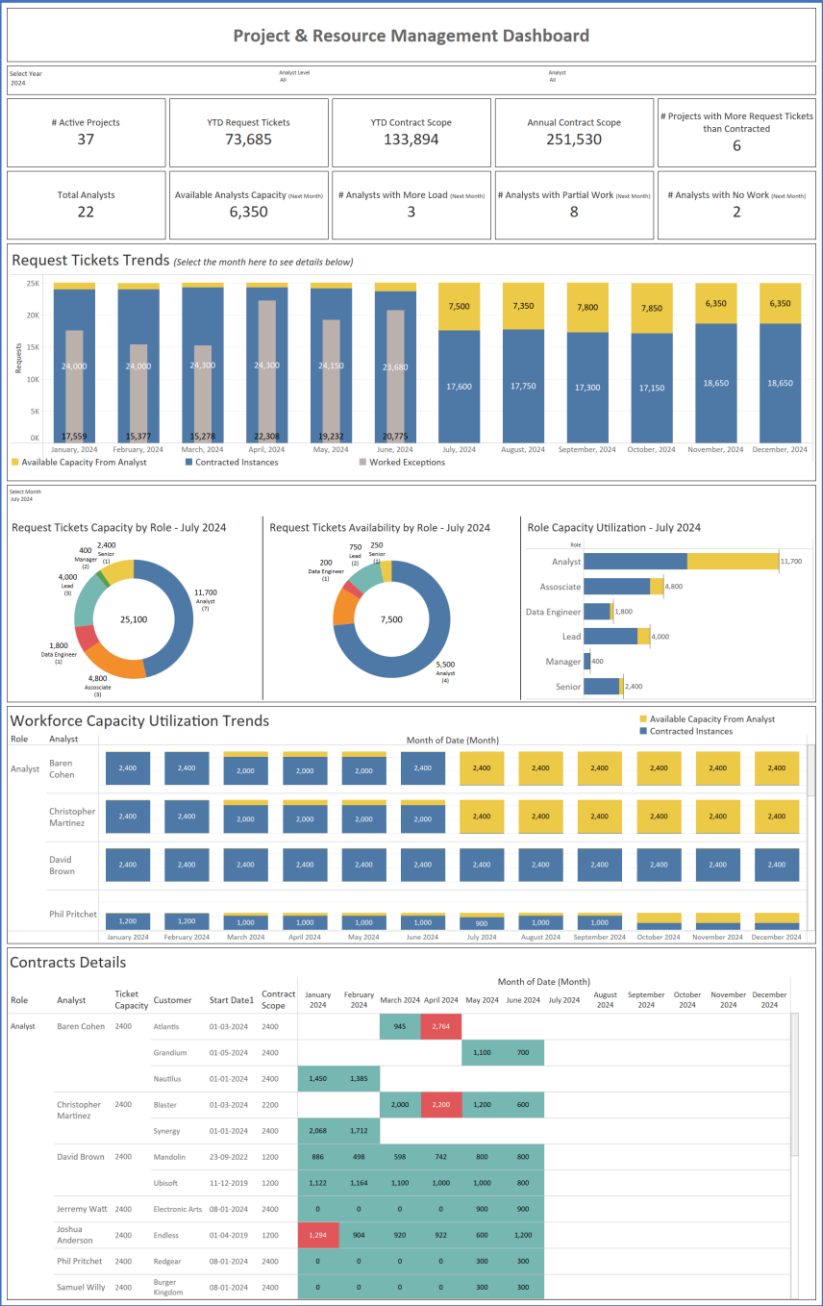Improved customer satisfaction leading to more projects

This is an overview

Project KPIs and monthly trend of contracted tickets

Break down of the workload by role and individual
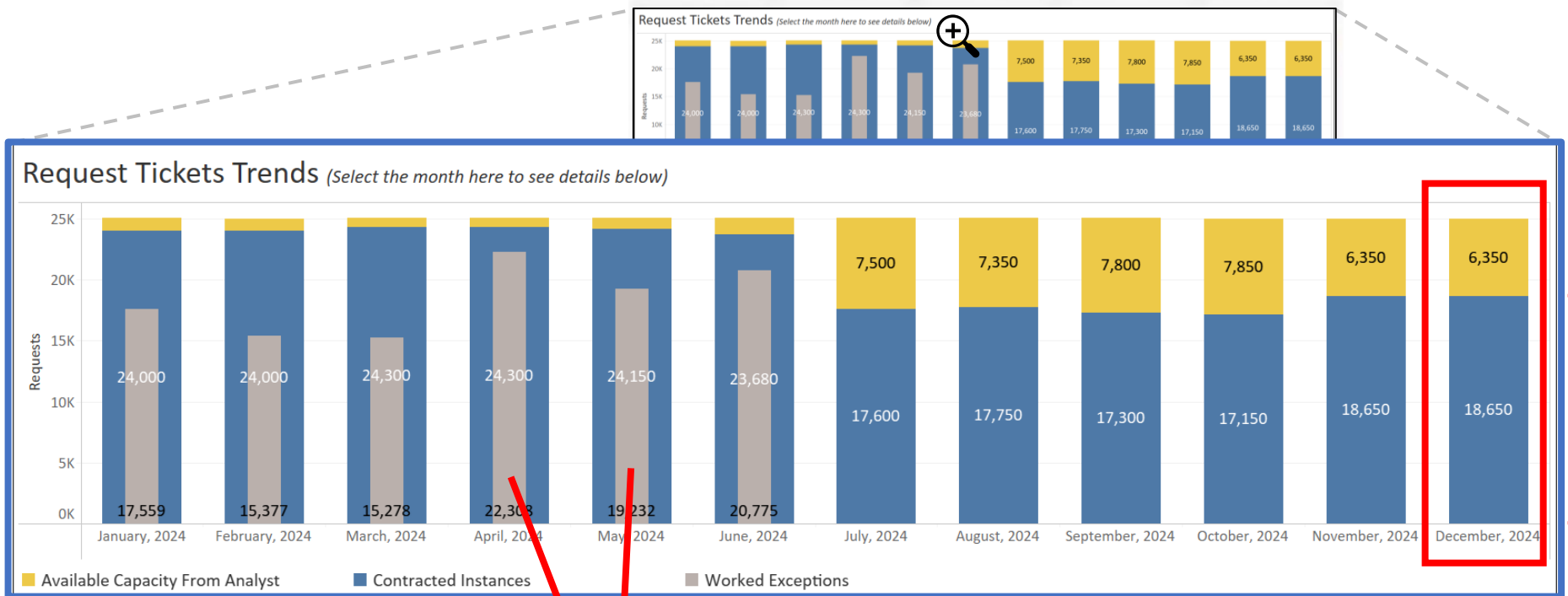
Tickets resolved by each analyst

Start by viewing the scope of ongoing projects and analyst workload for the next month

# Active Projects	YTD Request Tickets	YTD Contract Scope	Annual Contract Scope	# Projects with More Request Tickets than Contracted
37	73,685	133,894	251,530	6
Total Analysts	Available Analysts Capacity (Next Month)	# Analysts with More Load (Next Month)	# Analysts with Partial Work (Next Month)	# Analysts with No Work (Next Month)
22	6,350	3	8	2

See the workload trends for the analysts across months

Request Tickets Trends *(Select the month here to see details below)*

Request Tickets Trends *(Select the month here to see details below)*

Month	Worked Exceptions	Contracted Instances	Available Capacity From Analyst
January, 2024	17,559	24,000	
February, 2024	15,377	24,000	
March, 2024	15,278	24,300	
April, 2024	22,308	24,300	
May, 2024	19,232	24,150	
June, 2024	20,775	23,680	
July, 2024		17,600	7,500
August, 2024		17,750	7,350
September, 2024		17,300	7,800
October, 2024		17,150	7,850
November, 2024		18,650	6,350
December, 2024		18,650	6,350

Legend: ■ Available Capacity From Analyst ■ Contracted Instances ■ Worked Exceptions
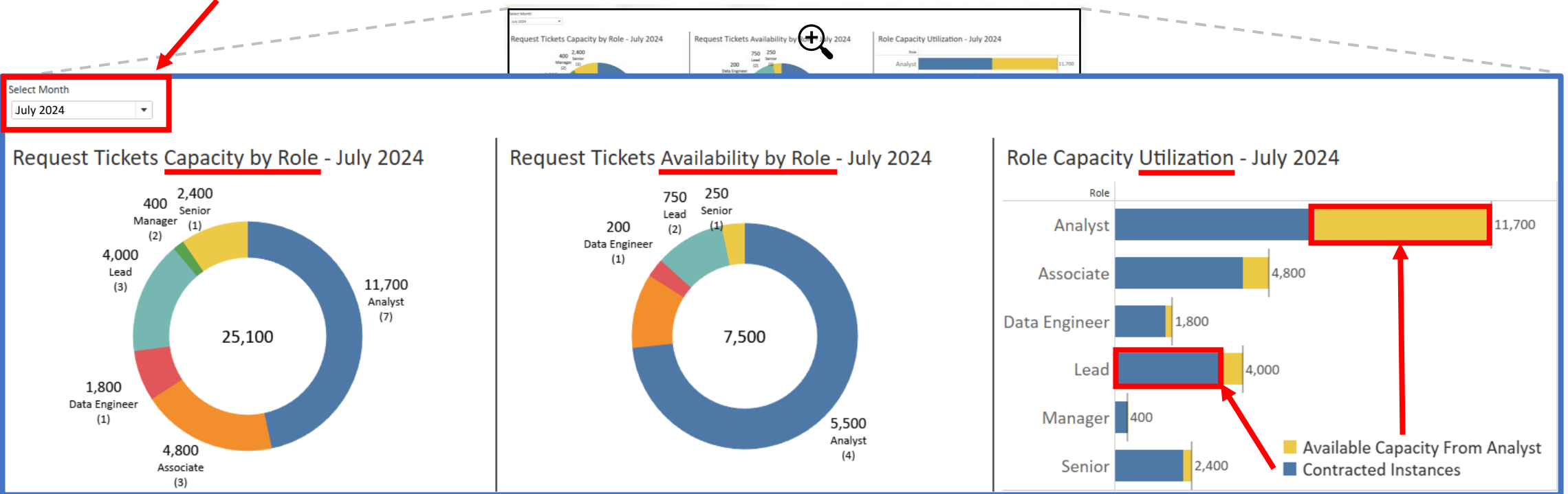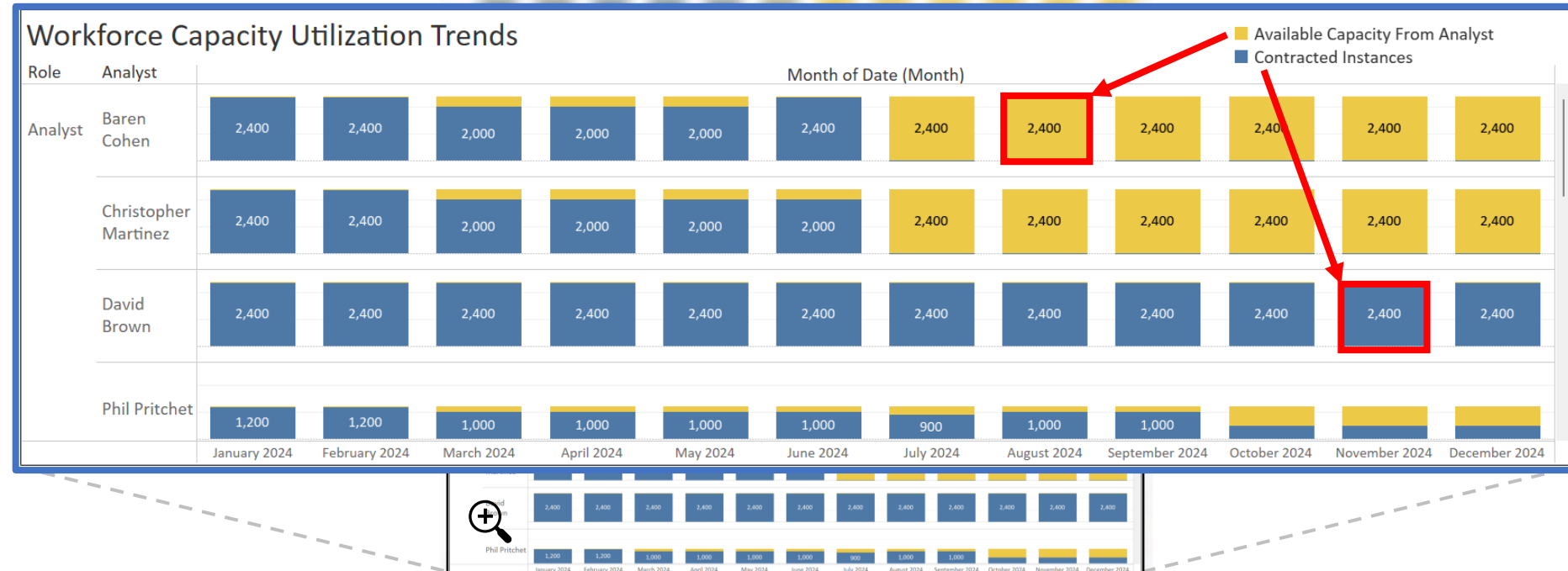
Available capacity of the analysts

Contracted tickets for the month

Total worked tickets by the analysts in the month

For the selected month, get the workload distribution across roles

Select Month

July 2024

Request Tickets Capacity by Role - July 2024

- 2,400 Senior (1)
- 400 Manager (2)
- 4,000 Lead (3)
- 11,700 Analyst (7)
- 1,800 Data Engineer (1)
- 4,800 Associate (3)

25,100

Request Tickets Availability by Role - July 2024

- 250 Senior (1)
- 750 Lead (2)
- 200 Data Engineer (1)
- 5,500 Analyst (4)

7,500

Role Capacity Utilization - July 2024

Role

- Analyst — 11,700
- Associate — 4,800
- Data Engineer — 1,800
- Lead — 4,000
- Manager — 400
- Senior — 2,400

Available Capacity From Analyst
Contracted Instances

Check the number of tickets assigned vs capacity at an analyst level

Workforce Capacity Utilization Trends

■ Available Capacity From Analyst
■ Contracted Instances

Role	Analyst	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	September 2024	October 2024	November 2024	December 2024
Analyst	Baren Cohen	2,400	2,400	2,000	2,000	2,000	2,400	2,400	2,400	2,400	2,400	2,400	2,400
	Christopher Martinez	2,400	2,400	2,000	2,000	2,000	2,000	2,400	2,400	2,400	2,400	2,400	2,400
	David Brown	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400
	Phil Pritchet	1,200	1,200	1,000	1,000	1,000	1,000	900	1,000	1,000			

Month of Date (Month)

Then, view ticket counts by customer and by analyst

Contracts Details

Role	Analyst	Ticket Capacity	Customer	Start Date	End Date	Contract Scope	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	September 2024	October 2024	November 2024
Analyst	Baren Cohen	2400	Atlantis	01-03-2024	30-04-2024	2400			945	2,764							
			Grandium	01-05-2024	30-06-2024	2400					1,100	700					
			Nautilus	01-01-2024	28-02-2024	2400	1,450	1,385									
	Christopher Martinez	2400	Blaster	01-03-2024	30-06-2024	2200			2,000	2,200	1,200	600					
			Synergy	01-01-2024	28-02-2024	2400	2,068	1,712									
	David Brown	2400	Mandolin	23-09-2022	Null	1200	886	498	598	742	800	800					
			Ubisoft	11-12-2019	Null	1200	1,122	1,164	1,100	1,000	1,000	800					
	Jerremy Watt	2400	Electronic Arts	08-01-2024	Null	2400	0	0	0	0	900	900					
	Joshua Anderson	2400	Endless	01-04-2019	Null	1200	1,294	904	920	922	600	1,200					
	Phil Pritchet	2400	Redgear	08-01-2024	Null	2400	0	0	0	0	300	300					
	Samuel Willy	2400	Burger Kingdom	08-01-2024	Null	2400	0	0	0	0	300	300					

Suppose a new project is starting next month (July),

and we need to allocate it to an analyst.

Let's determine who should take it and why >>

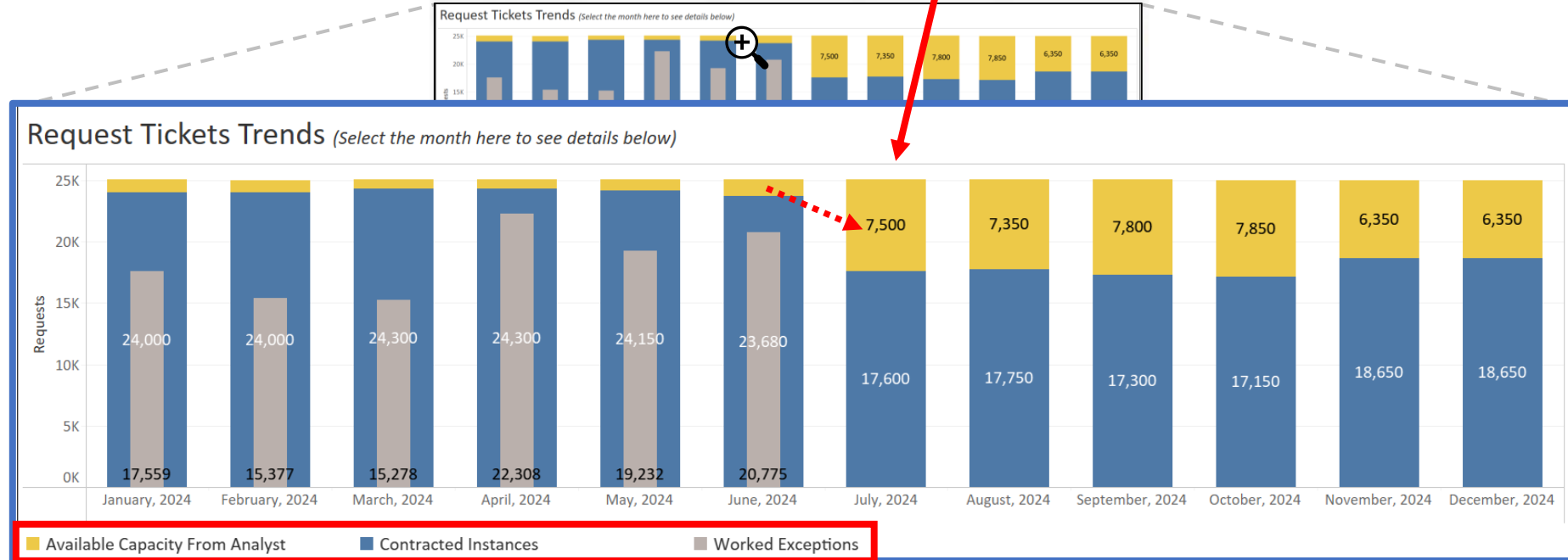**From the KPIs, we see that there are 2 analysts who are available from next month**

# Active Projects	YTD Request Tickets	YTD Contract Scope	Annual Contract Scope	# Projects with More Request Tickets than Contracted
37	73,685	133,894	251,530	6
Total Analysts	Available Analysts Capacity (Next Month)	# Analysts with More Load (Next Month)	# Analysts with Partial Work (Next Month)	# Analysts with No Work (Next Month)
22	6,350	3	8	2

Let's check their monthly capacity trend >>

Observe that workforce availability has increased from July

Request Tickets Trends *(Select the month here to see details below)*

Available Capacity From Analyst   Contracted Instances   Worked Exceptions

	January, 2024	February, 2024	March, 2024	April, 2024	May, 2024	June, 2024	July, 2024	August, 2024	September, 2024	October, 2024	November, 2024	December, 2024
Available Capacity From Analyst							7,500	7,350	7,800	7,850	6,350	6,350
Contracted Instances							17,600	17,750	17,300	17,150	18,650	18,650
Worked Exceptions	24,000	24,000	24,300	24,300	24,150	23,680						
	17,559	15,377	15,278	22,308	19,232	20,775						

Let's split it role-wise >>

In July, analysts have the maximum availability

Select Month
July 2024
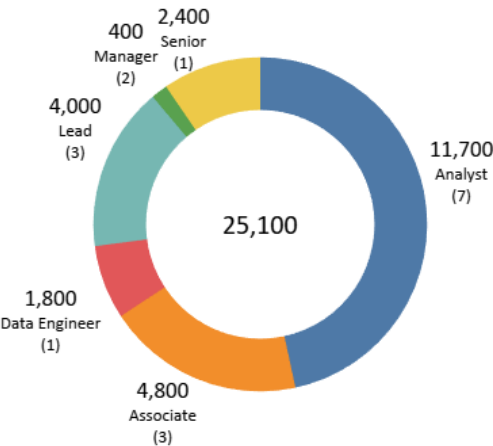
Request Tickets Capacity by Role - July 2024

400 Manager (2)
2,400 Senior (1)
4,000 Lead (3)
11,700 Analyst (7)
1,800 Data Engineer (1)
4,800 Associate (3)

25,100

Request Tickets Availability by Role - July 2024

200 Data Engineer (1)
750 Lead (2)
250 Senior (1)
7,500

5500 Analyst (4)

Role Capacity Utilization - July 2024

Role	
Analyst	11,700
Associate	4,800
Data Engineer	1,800
Lead	4,000
Manager	400
Senior	2,400
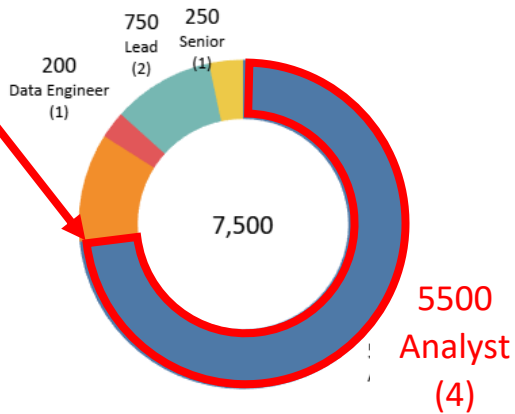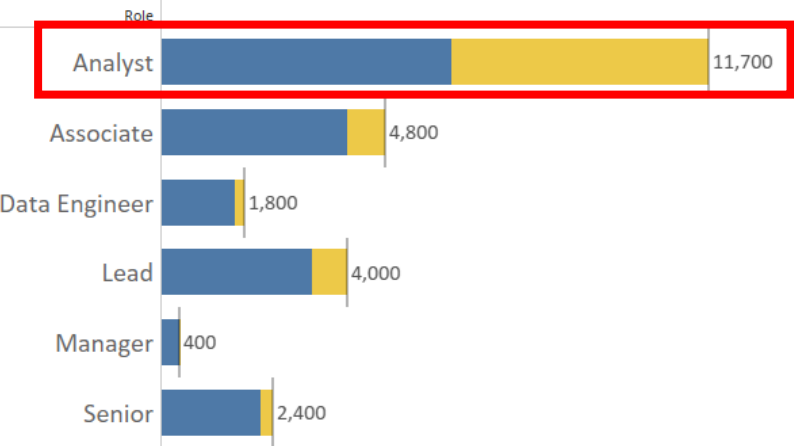
Let's see who are these analysts >>

Cohen & Martinez are available from July

Workforce Capacity Utilization Trends

- 🟨 Available Capacity From Analyst
- 🟦 Contracted Instances

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	Christopher Martinez	2,400	2,400	2,000	2,000	2,000	2,000	2,400	2,400	2,400	2,400	2,400	2,400
	David Brown	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400	2,400
	Phil Pritchet	1,200	1,200	1,000	1,000	1,000	1,000	900	1,000	1,000			

Month of Date (Month)

Let's get their project details >>

For these two analysts, observe their past clients to effectively allocate them to new ones.

Contracts Details

Role	Analyst	Ticket Capacity	Customer	Start Date	End Date	Contract Scope	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024	July 2024	August 2024	September 2024	October 2024	November 2024
									Month of Date (Month)								
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	Jerremy Watt	2400	Electronic Arts	08-01-2024	Null	2400	0	0	0	0	900	900					
	Joshua Anderson	2400	Endless	01-04-2019	Null	1200	1,294	904	920	922	600	1,200					
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