HOW TO MAKE WORKSHARE WORK FOR YOUR FIRM

DRIVING BETTER PROJECT OUTCOMES WITH BST10
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WORKSHARE

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noun

1. A method of distributing work, in which project services are provided from multiple offices of a consultancy using aligned work processes, where services rendered are effective, high quality, and indistinguishable site-to-site.
The engineering consultancy had a strong backlog and nice fees.

To serve their impressive portfolio of clients and feed an entrepreneurial spirit within the firm, SSR operated as 36 separate teams, almost like mini-companies within their company. Each team found their own clients, hired their own employees, and worked on their own projects.

That was all great for growth – until it wasn’t. The Great Recession hit, and SSR slowly but surely began to work their way through that backlog. By 2011, the consultancy faced a new reality: clients wanted more, for less.

With the days of higher project fees behind them, SSR had to find a way to become more efficient and effective, with fewer resources.
Over the next few years, the firm underwent a major restructuring. SSR shifted from 36 separate teams, down to three collaborative groups working across locations to deliver projects.

To better address client demands, the firm began to embrace the concept of workshare – where project services would be provided across multiple offices, instead of one. By distributing their work throughout the consultancy, SSR hoped to leverage underutilized resources who may not have been fully engaged otherwise if their own office backlog was low.
But, in order to make workshare really work for their firm, SSR Controller Carrie Johnson knew they needed better visibility. After all, they couldn’t assign people to projects if they couldn’t see who was available.

So, she turned to their BST software solution. By combining their new workshare philosophy with stronger resourcing and project visibility from BST, SSR was better prepared to survive – and even thrive – in the post-recession world.

“IN RESPONSE TO THE MARKET, WE DOWNSIZED STAFF, BUT ULTIMATELY WE HAVE BEEN ABLE TO ACHIEVE SIMILAR REVENUES. I BELIEVE PART OF OUR SUCCESS CAN BE ATTRIBUTED TO OUR WORKSHARE INITIATIVE.”

CARRIE JOHNSON
Controller, SSR
WHAT IS WORKSHARE?
In the arsenal of strategic tools for architecture, engineering, and environmental consulting (AEC) firms, workshare can be a key to navigating the various seasons that many consultancies experience.

In lean times, effective workshare helps identify and address pockets of under-utilization. In busy seasons, workshare helps spread project assignments around and mitigate staffing conflicts.

In all seasons, workshare is a catalyst for bringing together siloed offices into an integrated studio that delivers better outcomes for its clients and its people.

Simply put, workshare is the act of distributing work across offices to improve project performance and better utilize existing resources, no matter their geographic location.
2
EMBRACING WORKSHARE
GETTING STARTED

As we work with hundreds of AEC firms around the world, we often find that most consultancies can at least see the benefits of workshare and how efficient resource management processes can be critical to their success.

For Carrie Johnson at SSR, the advantages of leveraging resourcing capabilities in her BST solution were clear:

- Real-time employee and project data
- Improved detailed scheduling across the company
- Visibility of employees’ availability in other offices
- Management of utilization and capacity
- Awareness of the cost to complete projects
- Enhanced monitoring of project plan vs. actual

"As work rises in one area and declines in another, workshare allows us to smooth that labor out to make sure that everyone has a role and can contribute."

CARRIE JOHNSON
Controller
While many of the firms we speak with feel the need to take a step forward with workshare, they usually don’t know where to begin. And in some cases, they are so overwhelmed by the end objective that they are frozen in place.

The good news is you don’t have to be one of those firms. There are some very practical and actionable steps you can take, which over time will help you form a simplified approach to firm-wide resource management success:

1. **LAY THE FOUNDATION**

2. **LAYER IT UP**

3. **GO FIRM-WIDE**
First, focus on foundational resource management. Select an operating unit – such as an office, department, or studio within your firm – that has an appetite for change and is looking to make resource management improvements.

Concentrate on the active projects this unit currently has underway, planning them through completion. Then, implement an integrated project staffing and utilization management process and system within that unit.

**Bonus points:** also consider including leave or vacation time in employee scheduling, so that this unit can achieve basic visibility into staff availability.
Once you’ve achieved foundational success within your first unit, it’s time to step into advanced resource management. To do this, you’ll need to move beyond the single unit you started with and expand into sharing resources across multiple units.

The easiest (and most logical) way to do this is by bringing in additional operating units that are already working on projects with your first unit. Most of the hard work is already done, since you previously planned many of the projects out in your first phase.

At this juncture, you should also consider including additional types of projects, such as potential projects and non-chargeable endeavors. This will provide full visibility into staff availability spanning both active and proposed projects, as well as vacation (from your first step) and other types of non-chargeable time.
The final step in this process is extended resource management. By this point, you will have a collection of operating units that are benefitting from your new workshare and resource management framework, creating incentive to get the rest of the firm onboard.

Here, we recommend integrating earned value management principles into your resource management process, allowing you to further build upon the project planning discipline you established in the first two steps.

If you haven’t done so already, also consider leveraging a resource management system to provide resource and revenue forecasts across the firm, as you now have quality staffing plans to leverage for much better operational visibility.
HOW BST SUPPORTS WORKSHARE
With the simplified approach to resource management we outlined in the prior section, your firm now has the steps needed to easily embrace a new workshare strategy. But does it have the tools?

An integrated resource management system can help AEC firms improve visibility and support their utilization goals, among other objectives. Tools like BST10 help facilitate each stage of resource management listed above, as well as support easier transition from one stage to the next.

Let’s take a look at a few of the key features in BST10 that can help support your workshare initiative, namely project resourcing, resource planning, and staff assignments.
PROJECT RESOURCING

You read it earlier in SSR’s story, but we’ll say it again – you can’t assign people to projects if you can’t see who is available.

With the BST10 Resourcing Assistant, you can easily search across the entire firm to find staff with the right skills and availability for your project – potentially uncovering hidden employee gems that you’ve never worked with before. Without the tool, you’d be limited to only the employees you already know, calling around to figure out who is free. Who’s got time for that?

Once you find the right team members, you can instantly assign them to tasks. Our system will automatically alert them of their new assignment, so they can get started right away (or just as soon as you need them).
Realignment your focus to look beyond the project level and toward the full panoramic resource view for your entire unit (or department or office).

Whether you want to review the long-term utilization planned for your team, or concentrate on their short-term workloads, BST10 helps you share work optimally by providing multiple viewing options for your resource plan.

You’ll be able to review assignments, address imbalances, and update schedules for your entire team in one, integrated environment.

To see the BST10 Resource Plan, and our other resource management capabilities, in action.
You can make all the project plans you want, but until you communicate those plans to your team, they're just that – plans. The real work happens once assignments are out.

The BST10 Staff Dashboard makes distributing work easy by automatically notifying staff of new and existing assignments. Now, there'll be no questions about what they're working on when – they can find it all in their dashboard, eliminating miscommunications and improving productivity.

Plus – all employees will be able to review their personal performance metrics in real-time, helping them achieve their utilization, and ultimately, career goals.
CONCLUSION

As you begin to consider your workshare strategy, we want to leave you with this: at its core, workshare is built upon trust. Your firm can put a plethora of new processes and software solutions in place, but if your employees don’t trust that their colleagues in other offices can get the work done – and get it done right – then your operational efforts are hopeless.

By starting small and expanding slowly, you give your employees time to learn to trust one another, and you also give your firm the liberty to make both mistakes and improvements in your processes. And then, as you attain critical mass and success, peripheral operating units will begin to see the benefits for themselves – allowing for better engagement and smoother adoption.
WANT TO LEARN MORE ABOUT HOW BST100 CAN SUPPORT YOUR WORKSHARE INITIATIVE?

At BST Global, we’re here to help. If you’re looking for stronger project and resource management tools for your firm, drop us a note at hello@bstglobal.com or visit bstglobal.com/products.
BST Global is the leading provider of enterprise resource planning and work management software solutions for architecture, engineering, and environmental consulting firms globally. Today, over 100,000 end users across six continents and 65 countries rely on BST Global’s software solutions to manage their projects, resources, finances, and client relationships.