



# Advance Resource Planning

The effective budgeting, planning and ongoing management of your jobs and your people.

**Advance Resource Planning (RP)** is a new application from APS that delivers next generation scheduling and resource allocation for professional service firms.

It is designed to improve profitability through resource optimisation – helping firms to understand staff capacity and ensure that the right people are working on the right jobs at the right rate.

**Resource Planning** can be implemented in a number of ways depending on a firm's requirement. At a simple level, capacity can be very quickly calculated and operational to plan resources. Alternatively, the software can go far deeper and will provide for service line planning and non chargeable time.

As for the implementation of any new software application, making the most of **Resource Planning** will be achieved through a close working collaboration between your team and the APS team. Together we will configure the software to work the way you work.

Once configured and implemented, **Resource Planning** will benefit a practice and its clients by:

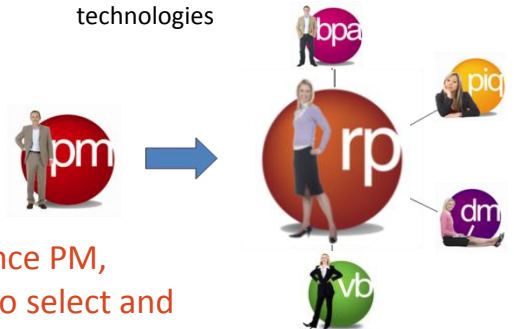
- providing greater certainty on price, delivery and margin
- allowing faster turnaround on jobs
- balancing the teams workload throughout the year
- giving absolute clarity on capacity

### Which firms will want this software?

- Clients already using standard APS Advance workflow techniques who want to better plan their capacity on an ongoing basis.
- Firms using standalone products who want to seamlessly integrate with WIP and Practice Management data generally. Practice, capacity and client data come together in one place.

### Firms may be feeling

- Frustrated that staff are sitting idle while others are very busy
- Frustrated with an unbalanced working year – busy peaks that could be levelled out through better planning
- Enthusiastic about the concepts of RP but unable to implement with current technologies



As an integral module within Advance PM, **Resource Planning** enables a firm to select and allocate available team members – the firm's capacity – to specific client engagements or matters, across the year. **Resource Planning** ensures the firm selects the right level of resource for the type of job being planned – ensuring from the outset that margin is protected, and the client's work is delivered on time and within budget.





### The Right Technologies

- Microsoft SQL Server platform for secure, robust, industry leading data storage
- All Advance applications are totally integrated with one another – as well as with 3<sup>rd</sup> party MS SQL based software
- Modern MS Windows interface that is instantly familiar to users
- Regular upgrades and innovation that leverage advances in technology
- Software configured to work the way you work

### The Right Team

- Over 20 years experience in practice software development
- A team of professionals that understands the issues in your day-to-day business
- Experienced and highly trained Consulting and Support teams focussed on accounting firms only
- Annual Conference and Client Briefings for clients to spend time with APS developers, management and key staff members

### The Right Price

- APS pricing is comparable with that of other practice software suppliers
- APS clients are regularly surveyed and say our overall package of services and product provides 'superior' value for money
- Maintenance fees cover the use of new software versions and include unlimited, accessible support
- No surprises - all consulting services are estimated or quoted in advance

### = Accountable Technology

- Our people are accountable, our software is accountable and our pricing is accountable....
- We identify what each client wants to achieve for their practice before implementation
- We make promises, we ask for the trust of clients and, most important of all, we deliver

## Resource Planning tackles the issues in 3 distinct process areas

### 1. Budgeting

This is the science behind fee earners' capacity. Standard time is automatically calculated by taking into account statutory holidays and each fee earner's weekly working pattern.

This number is further refined by accounting for known internal matters like annual leave and professional development. The resulting net capacity reflects each fee earner's billable capability and is the 'size of the bucket' for **Resource Planning**. Capacity (time) is converted into dollars using fee earner charge out rates. Capacity can then be analysed against the firm's financial goals.

### 2. Planning

Fee earners' available time is allocated to the most appropriate jobs based on attributes such as level of staff and grade of job. Advanced tools for bulk allocation and re-allocation of resources ensure maximum efficiency. Allocating the same resource to all jobs within a family group, or all jobs by partner responsibility is quick and easily executed.

### 3. Operational

The Work Centre is the brains of **Resource Planning**, empowering administrators with the best possible information to make intelligent decisions and spread workloads.

Live data can be filtered, grouped and sorted into saved views that provide critical information for those responsible for managing workflow. Colour coding highlights the status and progress on jobs – such as "on hold", "needs urgent attention", "overdue" and "complete". Resource Planning is even smart enough to provide a list of fee earners with 'Possible Capacity'-based on a range of scenarios that may include jobs completed within target date and budget, or large jobs that have been put on hold early. **Resource Planning** is designed to deal with real life where plans change. For example, re-allocation of a fee earner's entire workload is executed with a few simple clicks.

Key Features	Key Benefits
<ul style="list-style-type: none"> <li>• Practice Management integration</li> </ul>	<ul style="list-style-type: none"> <li>• Integration to timesheets (WIP) and other PM data reduces data maintenance and provides valuable workflow information, such as job performance to budget.</li> </ul>
<ul style="list-style-type: none"> <li>• Budgeting (capacity and financial)</li> </ul>	<ul style="list-style-type: none"> <li>• Accurate and efficient by leveraging information already stored in Practice Management.</li> </ul>
<ul style="list-style-type: none"> <li>• Batched planning</li> </ul>	<ul style="list-style-type: none"> <li>• Resource optimisation by matching each task with the most appropriate fee earner for the entire year's work.</li> </ul>
<ul style="list-style-type: none"> <li>• Multiple allocations</li> </ul>	<ul style="list-style-type: none"> <li>• Maximum efficiency in the planning process.</li> </ul>
<ul style="list-style-type: none"> <li>• Move allocations</li> </ul>	<ul style="list-style-type: none"> <li>• Quick and easy with flexible options to re-allocate tasks in bulk.</li> </ul>
<ul style="list-style-type: none"> <li>• Multiple milestone allocations</li> </ul>	<ul style="list-style-type: none"> <li>• Two or more people can share a task, such as 'Review', for more accurate capacity planning. Great for Audit.</li> </ul>
<ul style="list-style-type: none"> <li>• Repeatable Milestones</li> </ul>	<ul style="list-style-type: none"> <li>• Workflow for GST and other repeatable work throughout the year is now more efficient than ever.</li> </ul>
<ul style="list-style-type: none"> <li>• Enhanced Workflow Management</li> </ul>	<ul style="list-style-type: none"> <li>• Instant access to key information improves job turnaround and reduces write-offs.</li> </ul>

**To find out more about Advance Resource Planning, please call us on  
+61 2 9965 1300 (Australia), +64 9 302 2228 (NZ) or +44 0 207 246 9990 (UK).**