Resource Capacity Planning Checklist

What Should I Do?

Follow these steps to start performing resource capacity planning at your SMB.

Establish A Cross-Functional Team

- [ ] **Open lines of communication among leadership**
- [ ] **Use collaboration tools to stay connected**
- [ ] **Continuously evaluate portfolio and resource requirements**

Calculate Resource Capacity

- [ ] **Determine the number of people available to work on projects**
- [ ] **Estimate the time staff has to dedicate to project work**
- [ ] **Find the maximum reach of your resource capacity**

Determine Resources Required For Each Project

- [ ] **Review the work breakdown structure**
- [ ] **Map out requirements and tasks**
- [ ] **Identify roles and responsibilities required**

Prioritize Projects

- [ ] **Review portfolio**
- [ ] **Evaluate initiatives**
- [ ] **Rank projects according to value**

Allocate Resources Based on Project Priority

- [ ] **Order projects according to priority**
- [ ] **Staff highest priority projects first**
- [ ] **Initiate projects only when appropriate resources are available**