Project Profile:

Building Visibility & Efficiency in Resource Planning

A Salesforce + Resource Hero Solution

Overview

A B2B services firm with a large, distributed field team sought to gain real-time visibility into resource availability, skills, and upcoming assignments. Complex staffing needs across multiple service lines made resource forecasting and planning difficult, and managers relied on spreadsheets and ad hoc tracking, leading to reactive hiring and operational inefficiencies.

The client selected Resource Hero, a Salesforce-native application, to bring structure, automation, and visibility to their resource management processes.

Challenge

- **Limited visibility:** Managers lacked a centralized view of resources across locations and service lines.
- **Dynamic staffing needs:** Employees often covered multiple types of assignments, making it difficult to track skills and availability.
- **Fast-moving opportunities:** Staffing gaps needed proactive resolution to prevent project delays.
- **ERP integration requirements:** Projects and timecards remained in the ERP as the system of record, requiring seamless synchronization with Salesforce and Resource Hero.
- **Adoption barriers:** Teams were accustomed to legacy tools, informal processes, and inconsistent tracking.

Solution

To address the client's visibility and resource planning challenges, we implemented Resource Hero, building a centralized system that tracked skills, resources and assignments, automated workflows, and provided actionable insights. The solution combined custom objects, automation flows, and dashboards to create a complete workforce management ecosystem.

Custom Objects & Fields

We continued to build onto the out of the box Resource Hero capabilities to optimize it to fit this company's services and capture the right data about resources, skills, and assignments:

- **Skills & Qualifications –** Custom fields tracked industry specific certifications, languages, and specialized capabilities, allowing managers to quickly identify the right resource for each assignment.

- **Resources –** additional fields captured availability, travel readiness, tenure, employment type (full-time vs. 1099), home base, and assignment status. This enabled managers to see who was available and what gaps existed in their workforce.

- **Assignments –** Flags were added to categorize positions as unassigned, starting soon (within next 30 days), ending soon (within next 30 days), or at-risk, providing an at-a-glance view of staffing needs and priorities. These flags dynamically updated based on real-time project and opportunity data.

- **Custom List Views** – Built tailored list views with role-specific filters and key fields, making it easy for teams to quickly surface available advisors, identify flagged projects or assignments, and take action. These views were shared with the appropriate users to streamline day-to-day operations.

Example of Custom List View

Flows & Automation

Automation ensured that data was consistently updated and actionable without relying on manual entry:

- **Resource Assignment Flows:** When opportunities reached "Proposal Sent," assignment records were automatically created. Flags for upcoming or unfilled positions updated dynamically, giving managers immediate insight into upcoming staffing needs and gaps.

- **Resource Record Flows:** A daily scheduled flow kept all resource records up to date, including current, past, and future assignments. This eliminated the need for managers to maintain separate spreadsheets.

- **Project Record Flows:** Assignments were automatically transferred from opportunities to project records and completed or lost assignments were archived. This maintained historical tracking while keeping dashboards current.
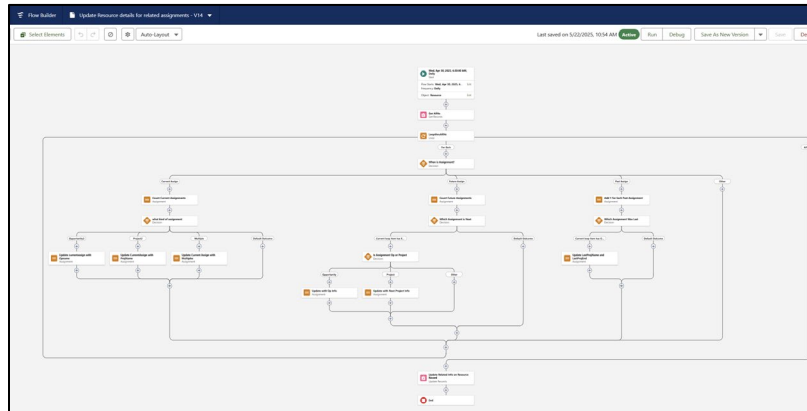

Example of Flow to Update Resource Assignments

Dashboards & Visibility

In addition to the standard reporting capability, we built custom reports and dashboards to give managers real-time operational intelligence:

- **Resource Availability & Skills:** Managers could filter and search for resources based on specific qualifications, ensuring the right person was assigned to the right project.

- **Forecasted Hours:** Weekly and 12-week views provided insight into staffing demand and upcoming capacity challenges.

- **Unassigned & At-Risk Positions:** Flags highlighted open positions and potential staffing gaps, prompting proactive hiring or backfilling decisions.

- **Operational Transparency:** Leadership could quickly see workload distribution, identify bottlenecks, and make strategic staffing decisions based on current data.
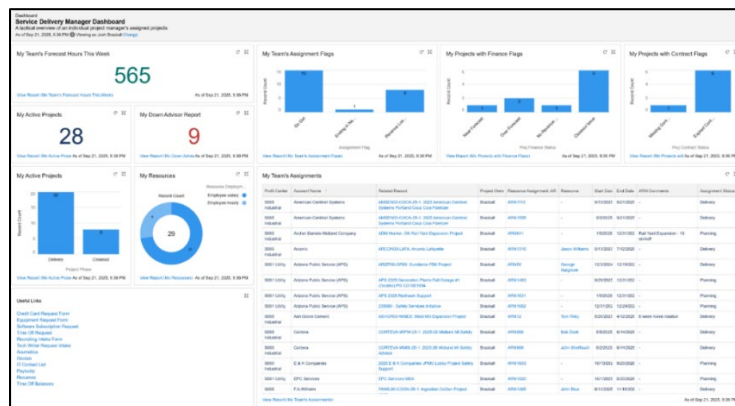
Example of Service Delivery Manager Dashboard View

Outcomes & Lessons Learned

Technical Success:

- Salesforce + Resource Hero successfully centralized workforce data, tracked assignments and skills, and automated workflows. Dashboards provided actionable insights, reducing manual effort and increasing transparency.

Operational Insights:

- Adoption was inconsistent; teams lacked standardized processes, and managers were not fully accountable to follow new workflows. Leadership support was uneven. Ultimately, the organization was not yet ready to fully leverage Resource Hero, despite technical success.

Tips for Readiness:

1. **Standardize processes first:** Align teams on disciplined workflows before implementing new tools.

2. **Establish ownership:** Assign a champion and backup to maintain continuity and drive adoption.

3. **Secure leadership support:** Visible buy-in and accountability are critical.

4. **Train and enforce adoption:** Managers must consistently use the system and enforce compliance.

5. **Pilot and scale thoughtfully:** Start small, refine processes, then expand across teams.

Takeaway:

- Salesforce + Resource Hero is a powerful combination for workforce visibility and planning, but technology alone is not enough. Strong processes, leadership support, and consistent adoption are essential for success.