




Forecasting vs. Firefighting:

How Engineering Teams Can Plan Projects with Confidence




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» PURPOSE & LEARNING OBJECTIVES

Purpose: To equip engineering teams with practical forecasting and planning tools to move from reactive problem-solving to balanced, proactive project delivery.

By the end of this webinar, participants will be able to:

- **Forecast project and utilization needs** by comparing project backlogs to utilization targets.
- **Establish consistent planning practices** using tools that align budget, timeline, and scope to create consistent baselines for your projects.
- **Balance project backlog and team capacity** by creating resource plans that achieve project success and maximize utilization.
- **Follow a structure for tracking and responding** using clear expectations and actuals to measure against your baseline and respond accordingly.
- **Develop proactive strategies** to maintain schedule predictability and project delivery standards in the face of shifting project demands.

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INTRODUCTION

Fiona Johann, PMP, AEC PM



Fiona

Johann, PMP, AEC PM

- **PMP-certified Project Manager** with a background in higher education leadership
- Partners with AEC professionals to build strong project management and leadership skills
- Experienced in strategic initiatives, program development, and stakeholder engagement
- Focused on helping engineers become confident, effective project leaders

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INTRODUCTION C. Ray Harvey



C. Ray

Harvey

- Director of Product and Customer Experience at Factor, leading product design and customer community activity.
- Over a decade of project management experience in professional services.
- Consultation with hundreds of AEC companies.
- Passionate about connecting AEC professionals with innovative project management tools.

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What Firefighting Looks Like

When you're firefighting, everything feels urgent. Deadlines are missed. Budgets are overspent. Quality suffers. Team members are either overworked or underutilized... and worst of all, constantly shifting schedules and priorities create a domino effect across your project portfolio.

Root issues include:

- Imbalance between project needs and utilization targets
- Lack of visibility into project expectations to drive prioritization
- Lack of real-time visibility into real team capacity
- Inconsistent planning, tracking, and responses between projects and teams

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From Chaos to Balance

To get out of firefighting mode, you need **balance** between your projects budget, timeline, and scope and your team's capacity. With a strong forecast, project plans, and resource schedule, you eliminate panic when responding to actuals.

**Balanced
Forecasts**

**Consistent
Project Plans**

**Smart Resource
Scheduling**

**Structured Tracking
and Response**

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Balanced Forecast

A **balanced forecast** combines your **work backlog**, based on estimated effort or value and timeline of your projects, and your team's target utilization. You can compare either in terms of dollars or hours.

Why it matters:

- Indicates when you can take on new work and when you need to hire
- Establishes a baseline for consistent practices and open communication around both firm and project health



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Balanced Forecast

Build your forecast by combining:

- Task estimates from current and incoming projects
- Estimated budgets or billing targets
- Key dates like design reviews or submission deadlines
- Capacity and utilization targets
- Scheduled hours on resource schedules

Future Scheduled Percentage

Target vs. Planned vs Scheduled Reports

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Consistent Project Plans

Building a Baseline

To balance your project backlog and your team's utilization, you need the full picture of each project.

✓ **Budget**

✓ **Timeline**

✓ **Scope (Tasks)**

\$ Fee Summary

Summary	Budgeted	Logged	Remaining	Invoiced	Left To Bill
Firm Services	\$37,800.00	\$7,900.00	\$29,900.00	\$2,742.00	\$35,058.00
> Sub-Consultants / Expenses In Fee	\$22,200.00	\$0.00	\$22,200.00	\$750.00	\$21,450.00
> Sub-Consultants / Expenses Not Included in Fee	\$5,000.00	\$32.75	\$4,967.25	\$0.00	\$5,000.00
Total	\$65,000.00	\$7,932.75	\$57,067.25	\$3,492.00	\$61,508.00

Budget

Timeline

Scope

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Consistent Project Plans

Tips for Consistency

- ✓ Get the full picture: budget, timeline, and scope
- ✓ Keep it in as few places as possible (ideally with actuals)
- ✓ Establish standards for who enters this info and when
- ✓ Expect change, but don't use it as an excuse!

Consistent baseline data on your project makes for smarter scheduling, easier tracking, simpler analysis, and less stress in response to the actuals!

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Smart Resource Scheduling

Resource scheduling only works in your favor when it balances project budget, timelines, and taskwork with your team's utilization. Ignore any part of this balancing act, and you risk ending up back in firefighting mode.

Common Workflow for Creating Your Initial Plan Scheduling

```

graph LR
    A[Start with Scope  
(assign tasks)] --> B[Balance With  
Budget + Timeline]
    B --> C[Adjust to Maximize  
Utilization]
  
```

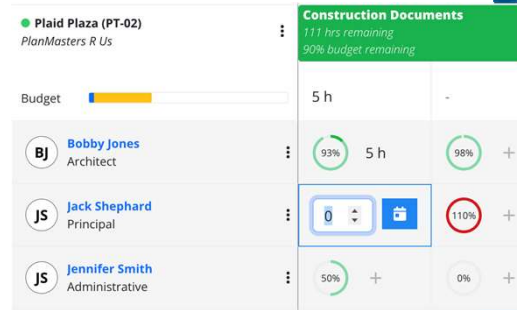
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Smart Resource Scheduling in Practice

Use your longterm project forecast as a guide, and then firm up shorter periods of time (2-4 weeks) when your team meets on resource planning. The right tools can make all the difference for this activity:

- ✓ Visualize estimated task work on the timeline
- ✓ Schedule hours to assigned team members
- ✓ Compare to the budget (in real-time ideally)
- ✓ Balance against utilization target (in real-time)

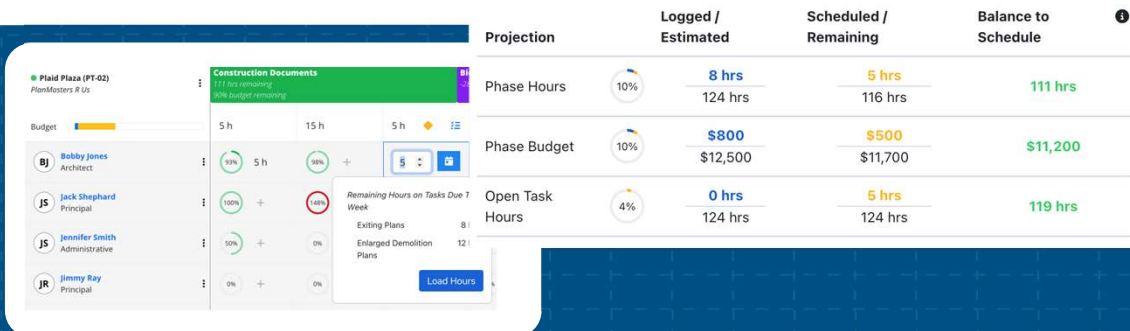


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Smart Resource Scheduling in Practice

Ideally, each hour scheduled for a team members will show you real-time feedback on their utilization across projects and the impact on remaining task hours and budget.



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Structured Tracking and Response

As you get consistent about forecasting, project planning, and resource scheduling, it's critical that you be as consistent with your regular weekly / bi-weekly / monthly check-ins:

Clear expectations are key:

- ✓ **Who does what before the meeting?**
- ✓ **What happens during the meeting?**
- ✓ **What analysis happens during the meeting?**
- ✓ **What responses can be expected?**



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Clear Expectations Look Like:

Before the Weekly Meeting:

- ✓ **Time and task information should be updated daily to inform actuals**
- ✓ **Project managers update project plan and status as necessary**
- ✓ **Team leads schedule resource hours based on project tasks and deadlines**

During the Meeting:

- ✓ **Review, by PM, misalignments between project budget/scope/timeline**
- ✓ **Review utilization issues by team member and team**
- ✓ **Course correct according to "if this, then that" methodology**

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Mini Case Study

A 40-person structural firm implemented:

- **Consistent project setup and planning methods**
- **Smart (balanced) resource scheduling**
- **Structured tracking and response**

Outcomes:

- ✓ **20% boost in utilization**
- ✓ **Fewer write-offs**
- ✓ **Better morale across teams**
- ✓ **Better financial stability for the firm**

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» Key Takeaways

You don't need to overhaul everything; just start with one change:

1. Balanced forecasts gives you a baseline for longterm planning
2. Consistent project plans set you up for smarter scheduling and tracking
3. Smart resource scheduling balances project expectations and utilization
4. Structured tracking and response patterns build security for your team, your projects, and your firm



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POLL QUESTION

Which planning method are you most likely to implement first?

- A** Balanced Forecasts
- B** Consistent Project Plans
- C** Smart Resource Scheduling
- D** Structured Tracking + Response

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SUMMARY

- Balanced forecasts compare backlog, target utilization, and scheduled work for long-term planning
- Consistent project plans include budget, timeline, and scope (tasks) to give a full-picture baseline
- Smart resource scheduling involves scheduling team members based on project plan while balancing utilization, ideally with real-time feedback as you assign hours
- Structured tracking and response gives team members clear expectation of what information is needed when, and how you will respond

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QUESTIONS AND DISCUSSION

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SURVEY LINK ➤

