

Case Study:

How to use allocation insights to advocate for your engineering org

Understanding where your teams are spending their capacity is key to building a healthy engineering organization. As a leader, having this data at your fingertips allows you to make quick decisions to drive your organization forward while also advocating for your people. Without this insight, it's easy to get stuck in a reactionary state – responding to issues after they've become major problems.

The team at an enterprise Silicon Valley tech company wanted to break this cycle. After relying on spreadsheets and manual reporting quarter after quarter, they were looking for a better way to understand how their teams were spending their time. They needed to ensure their work aligned with business goals and to increase visibility into velocity for more accurate planning. They partnered with Uplevel to help solve this problem.

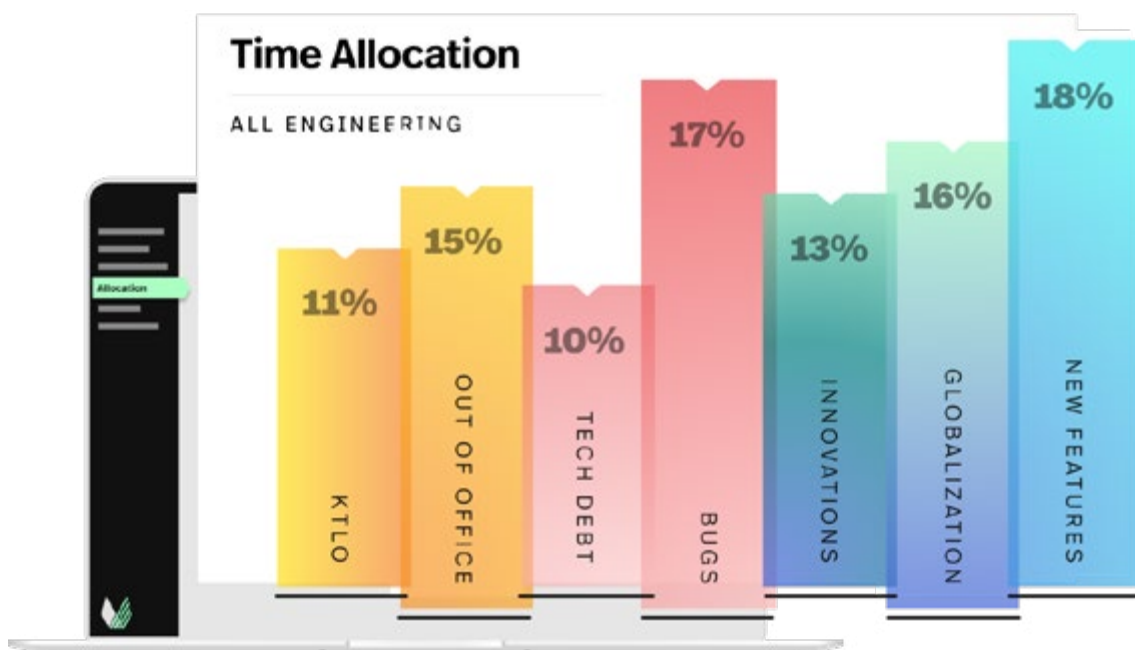


Background & Goals

Before working with Uplevel, the team relied on a large spreadsheet to track critical allocation data, sending it out quarterly to hundreds of managers. This information was not only important for engineering leadership to understand what their teams were working on but also for R&D tax capitalization. The process was highly manual and often took a lot of back and forth to get it right, since it was easy to be biased towards more recent work.

It also took away time engineers could have been spending working on projects – even a conservative estimate of 15 minutes per developer per quarter in a 1,000-person organization could lead to a loss of over \$80,000 annually. This approach was also inflexible and static, making it difficult to make data-driven decisions throughout the quarter.

Leadership needed an easier way to reference this data regularly to gain a deeper understanding of their velocity and time allocation. By helping them plan more effectively, they could make sure teams had the right amount of work while also taking into account the need for keep the lights on (KTLO) and bug work. Making sure teams aren't overloaded ultimately leads to less burnout and attrition, which is especially important during times of uncertainty.



“It was quite painful. The accuracy was not there. None of our decisions were actually based on data – it was all intuition.”

– Director of Engineering

“A very common challenge is portfolio management – being able to sequence out the work that needs to be done with the resources that are available. Uplevel helps us manage our developers so we get the best possible results.”

– Director of Engineering



Solution

The company leveraged Uplevel's Allocation Insights to accomplish their goals. Allocation Insights use data from four key sources: Slack metadata, Calendar metadata, Jira, and Code Repositories to automatically build an accurate picture of work being done across the organization. Leaders can easily visualize this data by organization, team, or individual, making it easy to answer important questions. The charts refresh daily, making it easy to provide a status report throughout the quarter.

“Uplevel has helped managers be more efficient, and to make their teams more efficient, because they can now see what their team allocation looks like.”

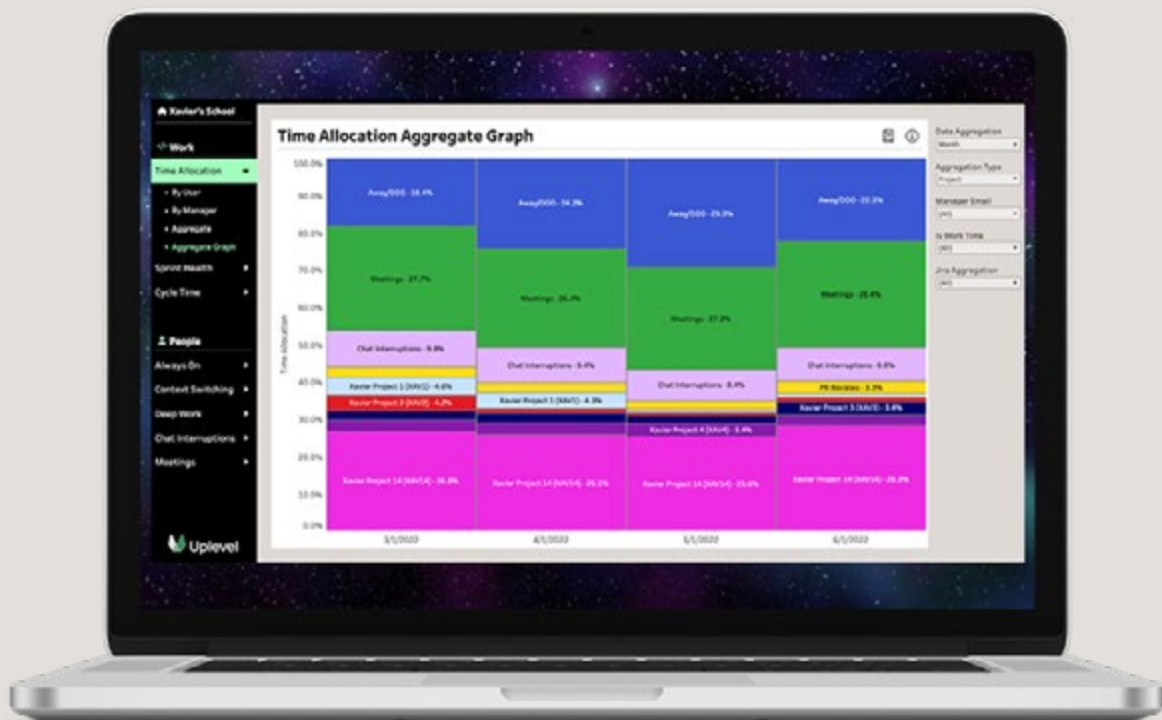
– Director of Software Development

Uplevel worked with leadership to understand their specific organizational needs and made sure to provide a solution that fit their requirements on both the analysis and security compliance levels. When they started using their Uplevel data, they were able to leverage insights into their historical velocity to plan more accurately.



“As we better understand the workflow and the work that’s being done, we’re going to do a better job of utilization and making sure that our staff’s not getting burned out.”

– Director of Engineering



Results

Implementing this tool makes their organization more dynamic. Managers are grateful for the change because it saves them time and helps combat recency bias. Leadership now has the tools and data to ensure they're properly aligning resources to projects, not overloading staff, and building a healthy culture. Going forward, the team wants to incorporate this data into their portfolio management process and leverage it as a predictor when it comes to future planning and resource allocation.

This data also comes into play during times of uncertainty. When budgets are tight, it is more crucial than ever for leaders to ensure their teams are investing in the right work that aligns with the goals of the business. Having allocation data readily available helps leadership understand where time is being spent, allows for adjustments as needed, and ultimately provides a tool to help advocate for their engineers.

“For me, the biggest thing is that I don't have to justify the numbers when I'm presenting to leadership on the productivity of our organization. The dashboard is right there, so I can confidently talk about where the resources were spent and what we have to spend going forward.”

– Director of Engineering



“Uplevel is my secret weapon
for defending headcount.”

– Director of Software Development

Ready to transform your team using Uplevel data?
Schedule a demo today.

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