



Capacity Planning using Karbon

Your host



Ian Vacin

Karbon

VP Education

Before we get started, *some housekeeping*...

zoom

- 1. Close any open apps**
- 2. Ask and we'll answer**
- 3. Have fun!**

1. Close any open apps
2. Ask and we'll answer
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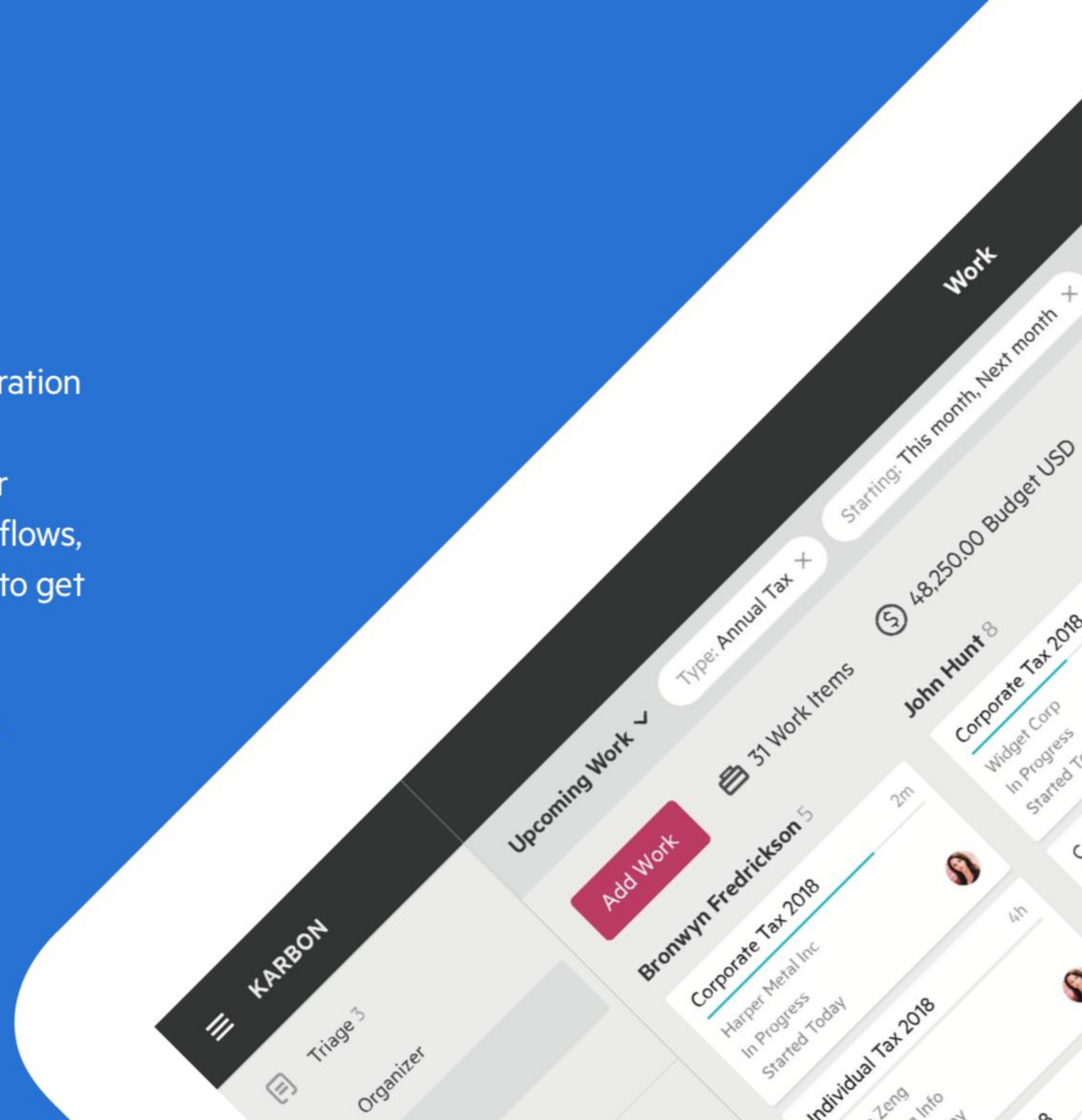
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How work gets done.

Karbon is an advanced workstream collaboration platform, ensuring visibility across teams, departments and locations. Combining your email, discussions, tasks and powerful workflows, Karbon keeps everything your team needs to get work done in one place and in context.

Learn how you can maximize your team's output with Karbon.

Visit karbonhq.com



- 1. Push and pull production**
- 2. Capacity planning tips**
- 3. Tracking budgets (\$ and time)**
- 4. Tracking actual time**
- 5. Customized dashboards**



Push and Pull Production

A person wearing a dark blue long-sleeved shirt, blue jeans, and brown sneakers is kneeling on a wooden floor, packing a black rolling suitcase. The suitcase is open, and the person is placing folded clothes, including a blue shirt and a red shirt, into it. The background is a plain white wall.

Tax season



85%

BENEFITS OF CAPACITY PLANNING

1

Maximize Utilization

Get more done with the same amount of people

2

Real-time Data

Accurate information on team availability

3

Better Planning

Know the demand for resources

4

Protect Your Team

Help your team avoid burnout

5

Organize Your Time

Know what's coming & prioritize

1. Maximize utilization
2. Real-time data
3. Better planning
4. Protect your team
5. Organize your time

Push



Just in case

Pull



Just in time

Push strategy is best for small demand uncertainty as the forecast will provide a good direction on what to produce and keep in inventory.

Pull strategy is best for high demand uncertainty and low importance for economies of scale because aggregation does not reduce cost.

Push strategy is best for small demand uncertainty as the forecast will provide a good direction on what to produce and keep in inventory.

Planning

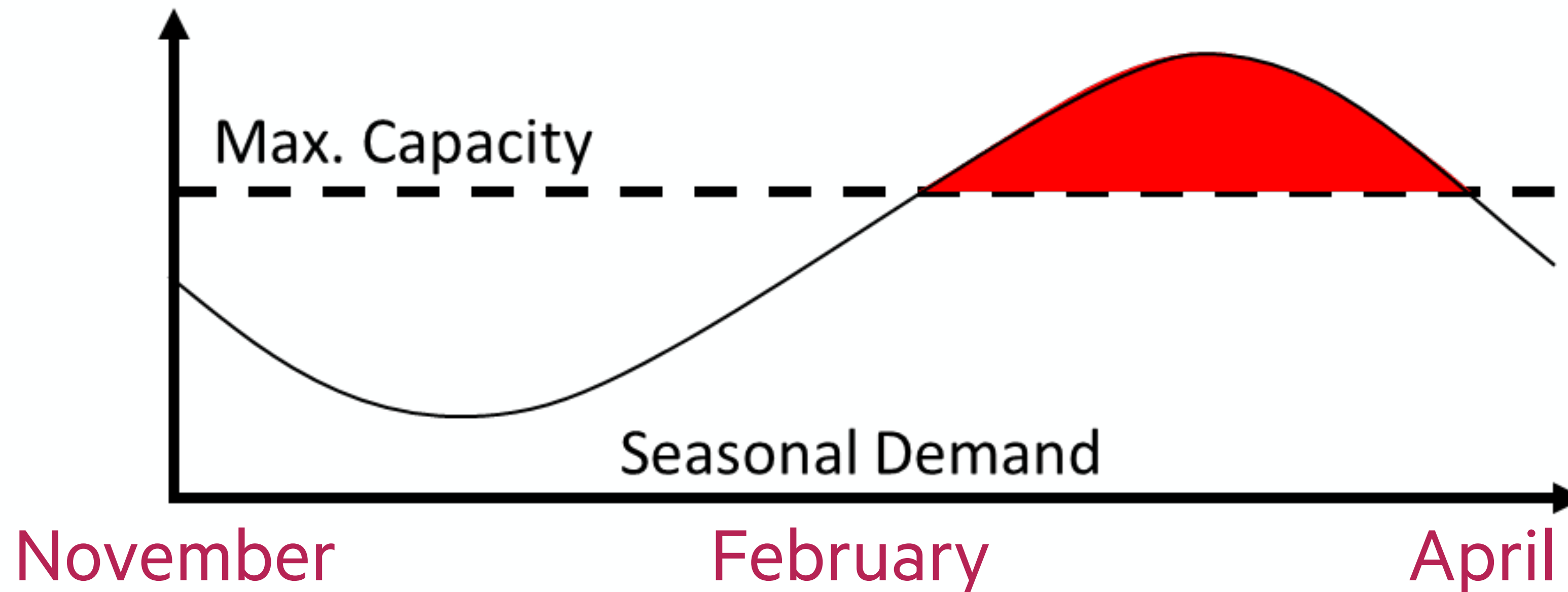
Pull strategy is best for high demand uncertainty and low importance for economies of scale because aggregation does not reduce cost.

Production

Push strategy for resource planning

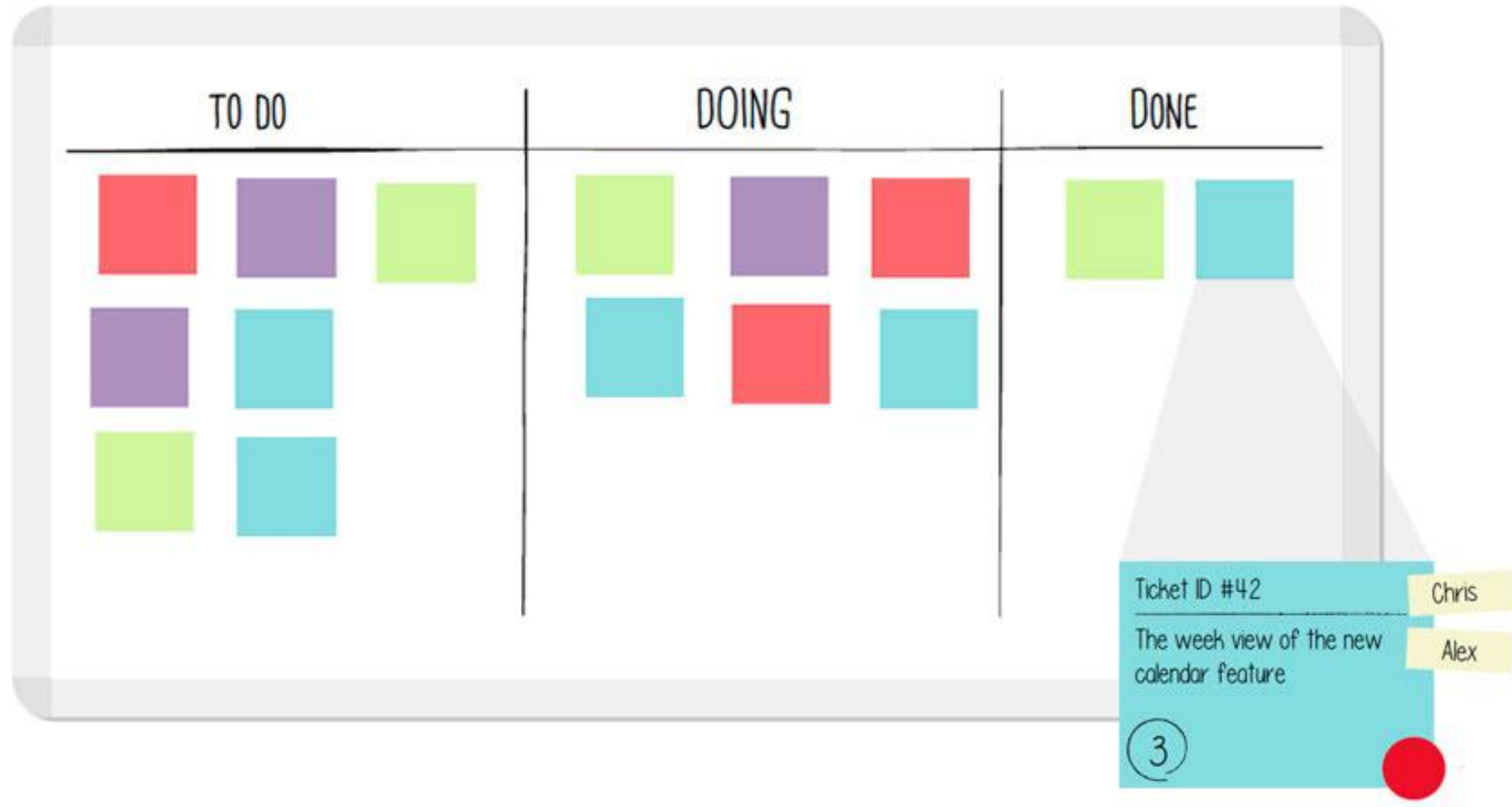
- Understand your workforce
- Analyze your team output
- Conduct demand analysis
- Conduct a supply analysis
- Build a gap analysis & strategy
- **Implement workforce plan:** Action plan, feedback loop, processes

Seasonality with tax

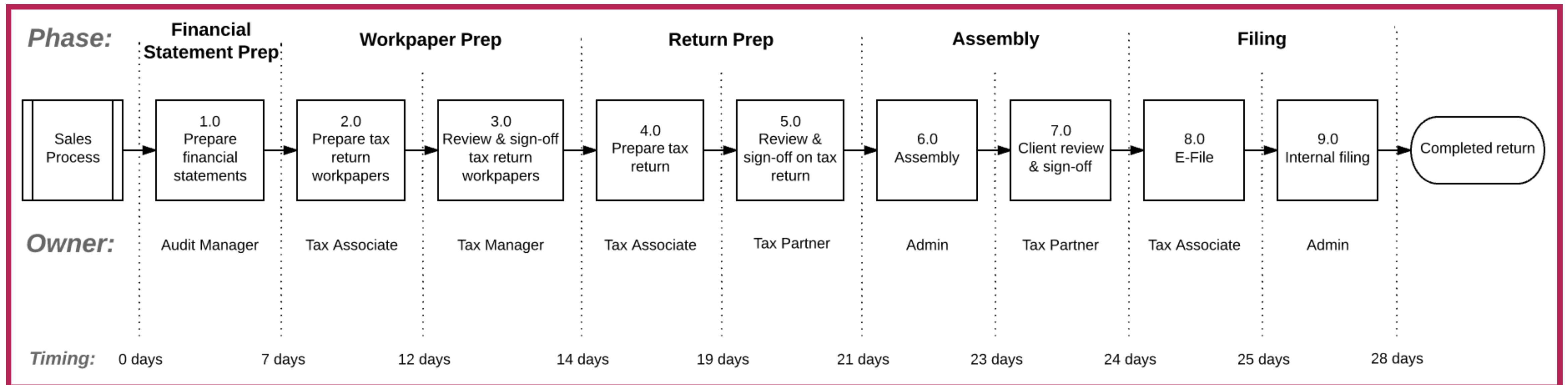


- What are the major causes of bunched work & lag time?
- Do you know when all new work must be done as an extension?
- Can you quote when work will exit the system when it starts?

Kanban: Just-in-time delivery



Overview of business tax process



Work moves across phases

Kanban: Work just flows.

Workflow Statuses

Create custom sub-statuses to suit your firm's workflow

Planned	Ready To Start	In Progress	Waiting	Completed
Add status	Add status	Setup	Waiting for client	Cancelled
		Prep	Waiting for CPA/CA	
		Process	Waiting for Gov't	
		Review	Add status	
		Assembly		
		Filing		

Kanban: Visualize capacity.

KARBON

Work

3

Triage 3

Organizer

Work

Clients

Low Priority

Drafts 2

Sent

Cleared

Insights

Practice Settings

Help & Feedback

Logout

Upcoming Work

Type: Annual Tax

Starting: This month, Next month

Add Filters

Save View

Add Work

31 Work Items

48,250.00 Budget USD

321h 40m Estimated Time

Bronwyn Fredrickson 4	John Hunt 8	Robert Muskat 5	Daniel Gonzalez 3	Murry Drake 4	Olivia Clifford 5	Maisie Holmes 2
4 Work Items \$5,500.00 Budget USD 36h 40m Estimated Time	8 Work Items \$20,000.00 Budget USD 133h 20m Estimated Time	5 Work Items \$1,250.00 Budget USD 8h 20m Estimated Time	3 Work Items \$3,000.00 Budget USD 20h 0m Estimated Time	4 Work Items \$10,000.00 Budget USD 66h 40m Estimated Time	5 Work Items \$3,500.00 Budget USD 23h 20m Estimated Time	2 Work Items \$5,000.00 Budget 33h 20m Estimate
Corporate Tax 2018 2m Harper Metal Inc In Progress Started Today	Corporate Tax 2018 32m Widget Corp In Progress Started Today	Individual Tax 2018 1h Lola Goepel In Progress Started Today	Corporate Tax 2018 17m Star Beauty Salons In Progress Started Today	Corporate Tax 2018 3h Kitchen Delights In Progress Started Today	Individual Tax 2018 4h Harlem van Dijk In Progress Started Today	Corporate Tax 2018 IT Wizards Inc. In Progress Started Today
Individual Tax 2018 4h Adam Zeng Gathering Info Starting Today	Corporate Tax 2018 1h 123 Warehousing In Progress Started Today	Individual Tax 2018 2d Tamara Hulu On Hold Started Today	Individual Tax 2018 3d Moana Taranaki Gathering Info Starting Today	Corporate Tax 2018 1d Local Hardware Supplies Gathering Info Starting Today	Corporate Tax 2018 4h Cavalry Race Team Gathering Info Starting Today	Corporate Tax 2018 Highland Coffee M Gathering Info Starting Wednesda
Corporate Tax 2018 1d Canary Media Production Waiting on Client Starting Today	Corporate Tax 2018 2h Smith and Co. In Progress Started Today	Individual Tax 2018 2d Gavin O'Connor Gathering Info Starting Today	Individual Tax 2018 3d Harriet London Gathering Info Starting Wednesday	Corporate Tax 2018 6d Halfmoon Bay Bistro Gathering Info Starting Today	Individual Tax 2018 1d Roger Horder Gathing Info Starting Today	
Individual Tax 2018 5d Yohan Seimon Gathering Info Starting Monday	Corporate Tax 2018 3d General Drinks Company Gathering Info Starting Today	Individual Tax 2018 5d Pamela Wayward Waiting on Client Starting Today		Corporate Tax 2018 1w Pacific Science Publishing Gathering Info Starting Monday	Individual Tax 2018 4d Richard Short Waiting on Client Starting Today	
	Corporate Tax 2018 5d Longhaul Logistics Ltd. Gathering Info Starting Today	Individual Tax 2018 5d Donal Richardson Waiting on Client Starting Monday			Individual Tax 2018 1w Pepe Zulu Waiting on Client Starting Wednesday	
	Corporate Tax 2018 5d Water4Life Foundation Waiting on Client Starting Monday					
	Corporate Tax 2018 1w Water4Life Foundation					



Capacity Planning Tips

Tips & tricks of managing capacity

1. **Talent:** Resources define capacity. Sadly, talent can't be brought on quickly so plan for demand months ahead of time.
2. **Team:** Make sure to get the right resources in the right seats.
3. **Budget:** In the absence of actuals, use budgeted numbers. Use worst, best and expected case method to pinpoint.
4. **Availability:** Since resources are defined by talent, you need to best understand the available time for work in future periods.
5. **Capacity:** Even if using a rough % of work complete, with the #s listed above, you can get a quick sense of your capacity.

Tips & tricks of managing work

1. **Work statuses:** Easily see where we are in a process, why things might be delayed, and where the bottlenecks are at a glance.
2. **Variability:** View time spent on an account (over time). If high or low, investigate to see what transpired between client & staff. Helps identify areas to improve, trends, & capacity.
3. **Kanban:** Leverage Kanban to visually view capacity. Use work types to view relative workloads per staff and balance as needed.
4. **Checklists:** Build checklists to give a proper sense of progress. Not too thin and not too long. Quick to read and quick to check.

Tracking Budgets (\$ and time)

Set budgets for time and \$ on the work Details tab.

Business tax return (T2) — Work template

Edited 22 Jan
Used to create work 4 times
Last used 7 Oct

TasksDetails

Basics

Edit

Description

Karbon best practice template for business tax returns (e.g. T2). To use with Karbon, set all business tax returns under a "Tax (business)" work type. Use the same process but create different business tax return work templates to represent each. While the business tax forms are different, the higher level process is not. This does not include GST/HST tax work.

The process is flexible to allow for client consultations at both the beginning of the process and at the end. Modify to suit your needs or keep as is and adjust as you go (by either clicking unused sections complete or deleting the irrelevant sections altogether). This does not include end of fiscal year bookkeeping and financial statement derivation, but does include necessary checks on work done by other accounting professionals.

Work Type

Tax (business)

Budget

1,500.00 CAD

Estimated Time

9h 0m

Work Team

Edit

Estimated Time

A

Accountant

3h 15m

A

Admin

3h 0m

P

Partner

2h 0m

R

Reviewer

45m

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Kanban: Visualize capacity.

KARBON

Triage 3

Organizer

Work

Clients

Low Priority

Drafts 2

Sent

Cleared

Insights

Practice Settings

Help & Feedback

Logout

Work

3

+

Upcoming Work

Type: Annual Tax

Starting: This month, Next month

Add Filters

Save View

Add Work

31 Work Items

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321h 40m Estimated Time

Bronwyn Fredrickson 4

4 Work Items

\$5,500.00 Budget USD

36h 40m Estimated Time

Corporate Tax 2018 2m

Harper Metal Inc

In Progress

Started Today

Individual Tax 2018 4h

Adam Zeng

Gathering Info

Starting Today

Corporate Tax 2018 1d

Canary Media Production

Waiting on Client

Starting Today

Individual Tax 2018 5d

Yohan Seimon

Gathering Info

Starting Monday

John Hunt 8

8 Work Items

\$20,000.00 Budget USD

133h 20m Estimated Time

Corporate Tax 2018 32m

Widget Corp

In Progress

Started Today

Corporate Tax 2018 1h

123 Warehousing

In Progress

Started Today

Corporate Tax 2018 2h

Smith and Co.

In Progress

Started Today

Corporate Tax 2018 3d

General Drinks Company

Gathering Info

Starting Today

Corporate Tax 2018 5d

Longhaul Logistics Ltd.

Gathering Info

Starting Today

Corporate Tax 2018 5d

Water4Life Foundation

Waiting on Client

Starting Monday

Corporate Tax 2018 1w

Water4Life Foundation

Robert Muskat 5

5 Work Items

\$1,250.00 Budget USD

8h 20m Estimated Time

Individual Tax 2018 1h

Lola Goepel

In Progress

Started Today

Individual Tax 2018 2d

Tamara Hulu

On Hold

Started Today

Individual Tax 2018 2d

Gavin O'Connor

Gathering Info

Starting Today

Individual Tax 2018 5d

Pamela Wayward

Waiting on Client

Starting Today

Individual Tax 2018 5d

Donal Richardson

Waiting on Client

Starting Monday

Daniel Gonzalez 3

3 Work Items

\$3,000.00 Budget USD

20h 0m Estimated Time

Corporate Tax 2018 17m

Star Beauty Salons

In Progress

Started Today

Individual Tax 2018 3d

Moana Taranaki

Gathering Info

Starting Today

Individual Tax 2018 3d

Harriet London

Gathering Info

Starting Wednesday

Murry Drake 4

4 Work Items

\$10,000.00 Budget USD

66h 40m Estimated Time

Corporate Tax 2018 3h

Kitchen Delights

In Progress

Started Today

Corporate Tax 2018 1d

Local Hardware Supplies

Gathering Info

Starting Today

Corporate Tax 2018 6d

Halfmoon Bay Bistro

Gathering Info

Starting Today

Corporate Tax 2018 1w

Pacific Science Publishing

Gathering Info

Starting Monday

Olivia Clifford 5

5 Work Items

\$3,500.00 Budget USD

23h 20m Estimated Time

Individual Tax 2018 4h

Harlem van Dijk

In Progress

Started Today

Corporate Tax 2018 4h

Cavalry Race Team

Gathering Info

Starting Today

Individual Tax 2018 1d

Roger Horder

Gathering Info

Starting Today

Individual Tax 2018 4d

Richard Short

Waiting on Client

Starting Today

Individual Tax 2018 1w

Pepe Zulu

Waiting on Client

Starting Wednesday

Maisie Holmes 2

2 Work Items

\$5,000.00 Budget USD

33h 20m Estimated Time

Corporate Tax 2018

IT Wizards Inc.

In Progress

Started Today

Corporate Tax 2018

Highland Coffee M

Gathering Info

Starting Wednesday

Track estimating time and budget \$ per column.

KARBON

Triage 3

Organizer

Work

Clients

Work

3

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Starting: This month, Next month

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Save View

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4 Work Items

\$10,000.00 Budget USD

66h 40m Estimated Time

Insights

Practice Settings

Help & Feedback

Logout

Adam Zeng
Gathering Info
Starting Today

Corporate Tax 2018
Canary Media Production
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Starting Today

Individual Tax 2018
Yohan Seimon
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Starting Monday

123 Warehousing
In Progress
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Longhaul Logistics Ltd.
Gathering Info
Starting Today

Corporate Tax 2018
Water4Life Foundation
Waiting on Client
Starting Monday

Corporate Tax 2018
Water4Life Foundation

Tamara Hulu
On Hold
Started Today

Individual Tax 2018
Gavin O'Connor
Gathering Info
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Individual Tax 2018
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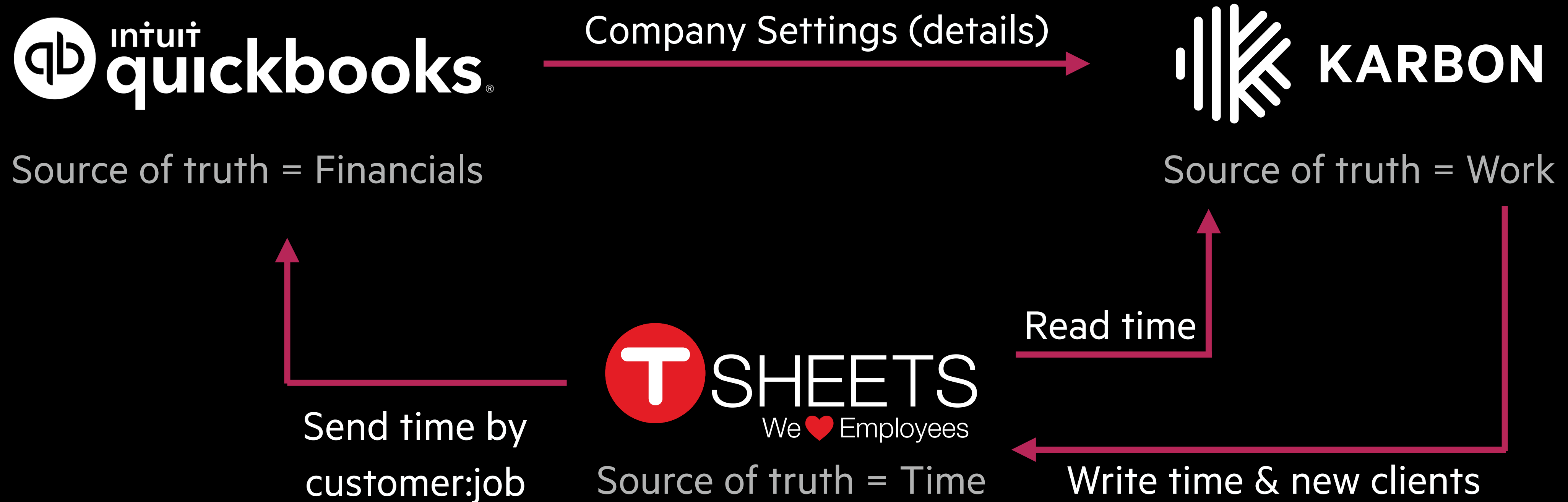
Highland Coffee M
Gathering Info
Starting Wednesday

Tracking Actuals

Time vs. Work

Where should you track each?

How data flows between Karbon, TSheets & QB

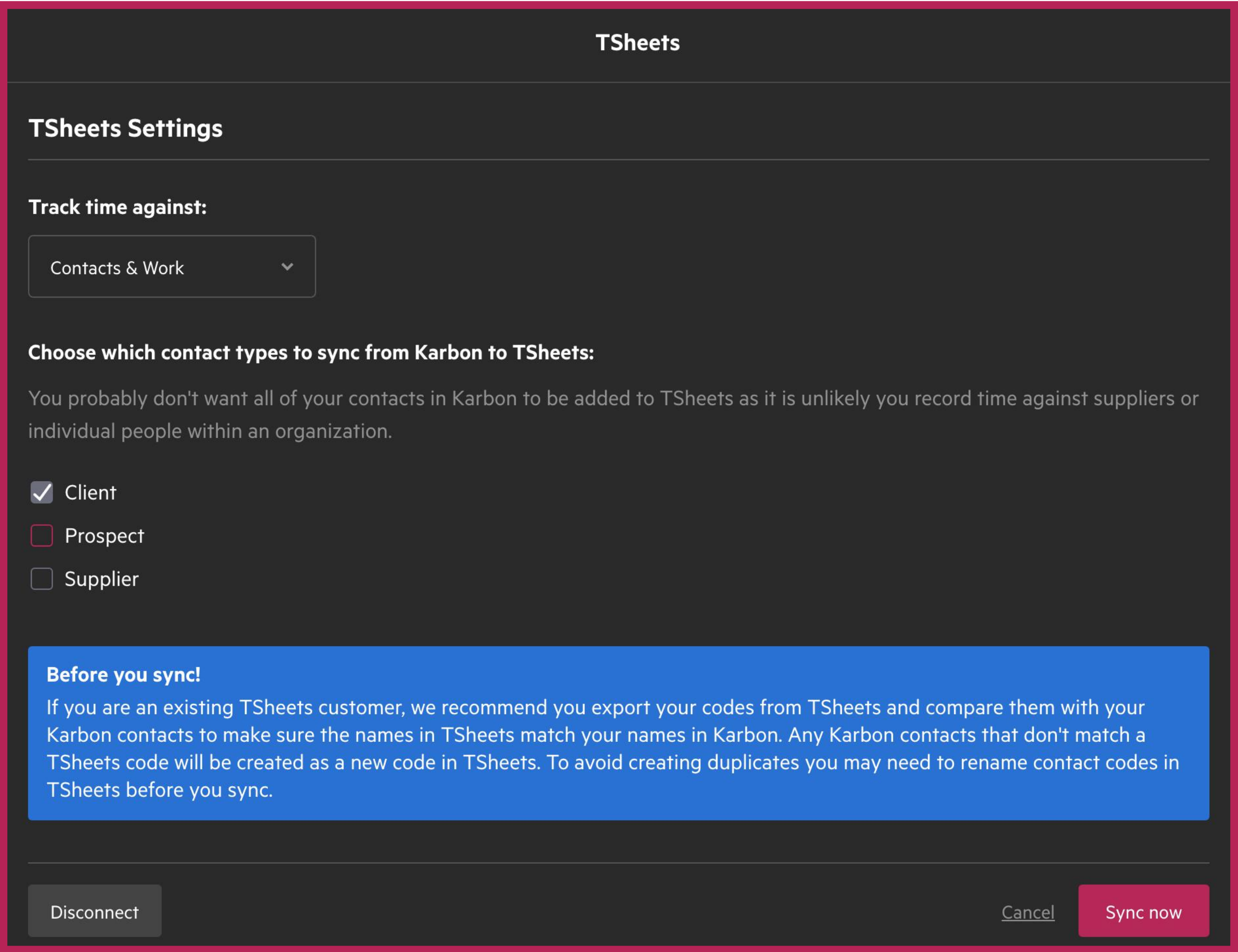
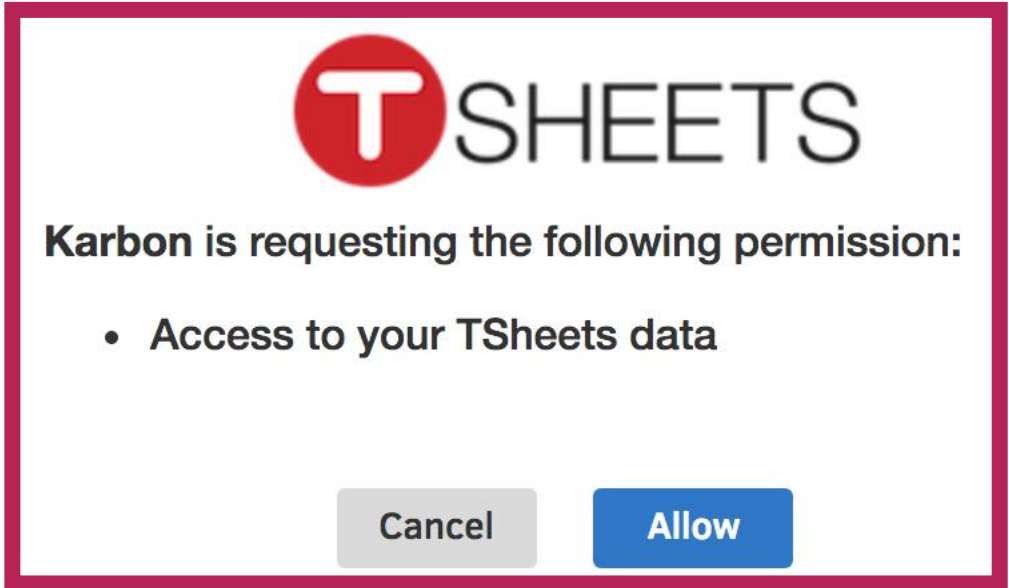
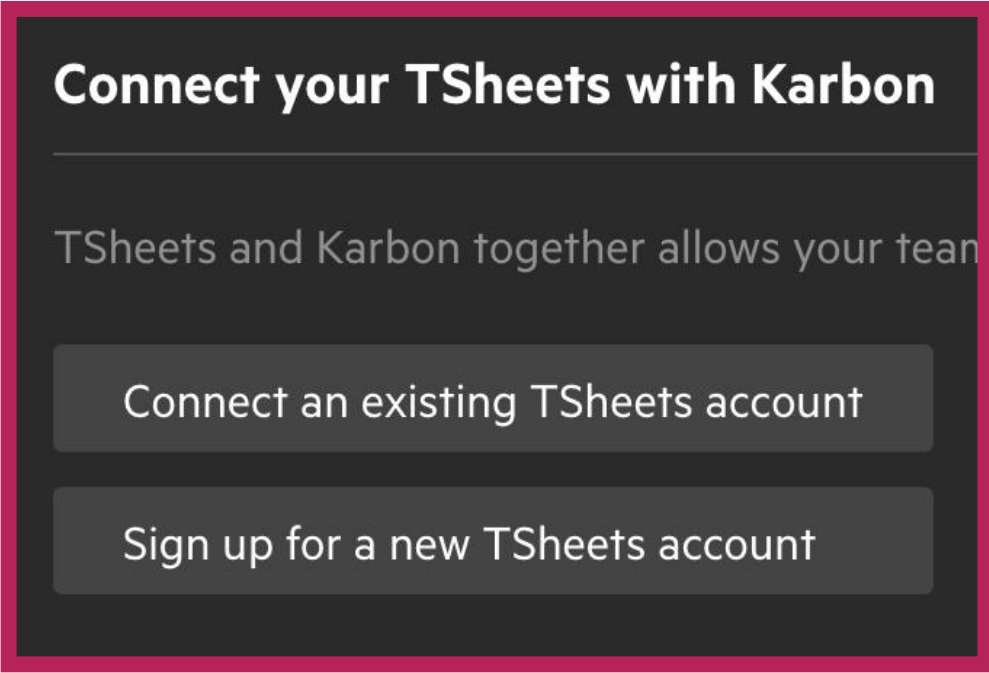


For time & billing to flow, contact names must match between all three systems.

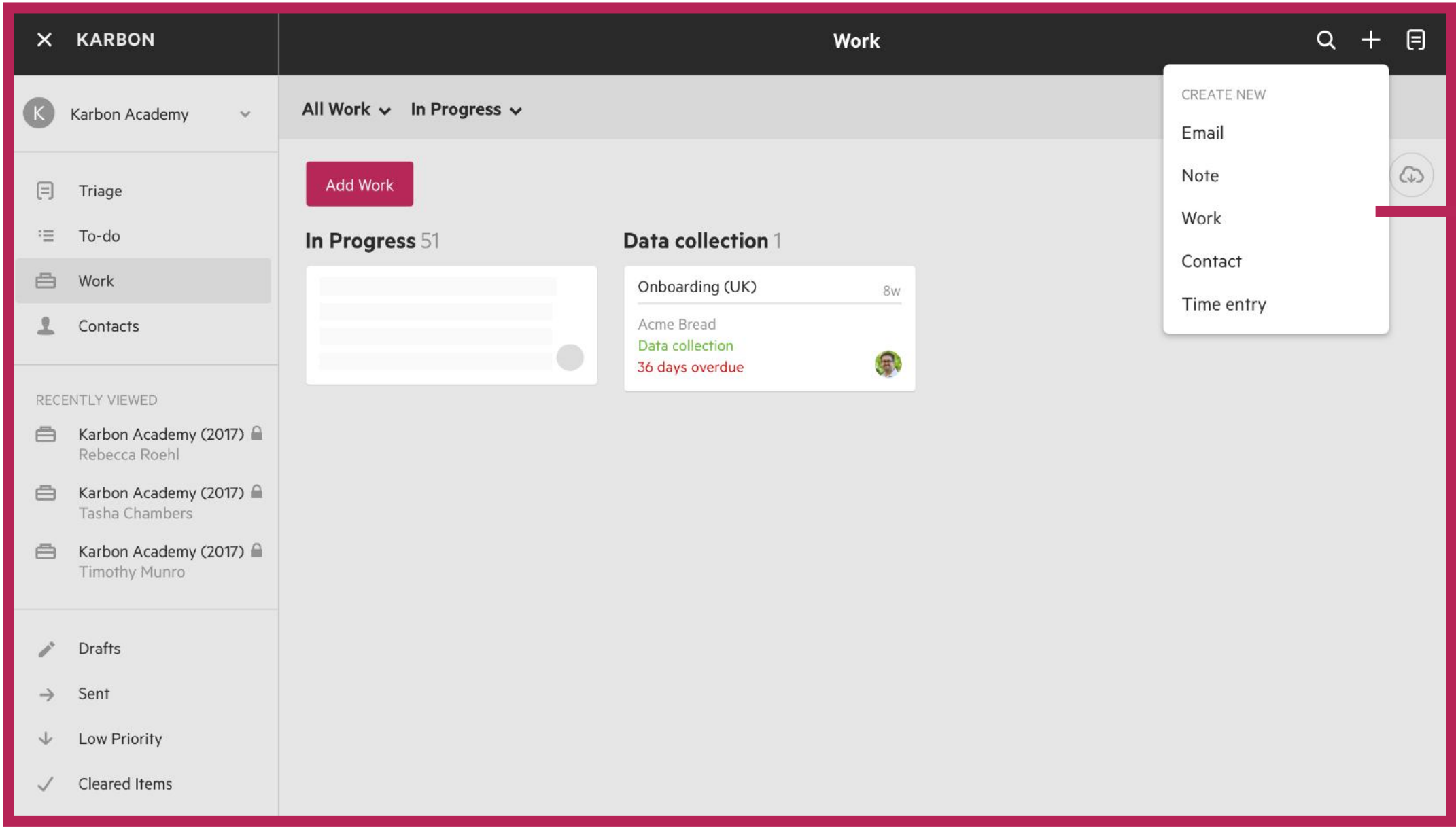
TSheets + Karbon: Integration & usage

1. **Compare:** For all shared contacts, adjust Karbon & TSheets contacts & clients so they match exactly.
2. **Sync:** In Karbon, sign up or sign in to TSheets to initiate the sync.
3. **Specify:** Once connected, specify which contact type(s) to sync and whether to track time for contacts, work or both.
4. **Track:** Track time in TSheets as you normally would. If for a shared contact/work, the time will appear in Karbon's Time tab.
5. **Add:** Add time to TSheets using the + button or time tab in Karbon.

Simple steps to sync TSheets & Karbon



Tracking time in TSheets or Karbon



The 'Time entry' form is shown. It has a 'Track time against' section with radio buttons for 'Work' (selected) and 'Contact'. Below this is a dropdown menu showing 'New Client Onboarding'. The 'Date' field is set to 'Today' and the 'Duration' is '1 h 0 m'. There's a 'Notes' field with the text 'Held first client meeting'. At the bottom, there are 'Cancel', 'Save', and a dropdown arrow buttons. A red arrow points from the 'Time entry' menu in the previous screenshot to this form.

The screenshot shows the 'Acme Bread' contact page in Karbon Academy. The page has tabs for 'Timeline', 'Work', 'Time' (selected), and 'Details'. The 'Time' tab shows a summary of time tracked against 'Acme Bread' for the last two months (Nov - Dec 2017). It states: 'This is time tracked against Acme Bread, the contact, for the last two months (Nov - Dec 2017). Time tracked against work for Acme Bread is not included below, it is on the work itself. For more time tracking reports visit [TSheets](#).' Below this, it shows 'Total time tracked (Nov - Dec 2017)' as '2h 0m'. A list of time entries is shown, including one for 'Ian Vacin' on 'Dec 6, 2017' with a note 'Discovery work for project' and a duration of '2h 0m'. A red arrow points from the 'Time entry' form in the previous screenshot to this page. A red arrow also points from the 'Time entry' form to the 'Time' tab in this screenshot.

The screenshot shows the TSheets 'Time Entries' interface. It has tabs for 'Timesheets List', 'Manual Time Card', and 'Time Slider'. The 'Timesheets List' tab is selected. There's a '+ Add Time' button and an 'Actions' dropdown. Below this is a search bar for 'Search employees' and a 'Show full Job' checkbox. A table of time entries is shown, with columns: Day, Time In, Time Out, Hours, First Name, Last Name, Job, Location, and Notes. The table contains two entries for 'Wed Dec 06'.

Day	Time In	Time Out	Hours	First Name	Last Name	Job	Location	Notes
Wed	Dec 06	manual entry	2:00	Ian	Vacin	Acme Bread	Karbon	Discovery work fo...
Wed	Dec 06	manual entry	1:00	Ian	Vacin	Acme Bread > New Client Onboar...	Karbon	Held first client...

Customized Dashboards

12 Karbon work dashboards

- Plan your own day
- Progress of a specific team
- Identify bottlenecks for similar jobs
- View all work for clients you own
- Stay across work for clients managed
- Manage team capacity
- Plan for future capacity
- Report on output
- Identify common bottlenecks
- Monitor a specific client group
- View all work for similar clients
- Manage your sales process

<http://bit.ly/2VQydo9>

Manage team capacity

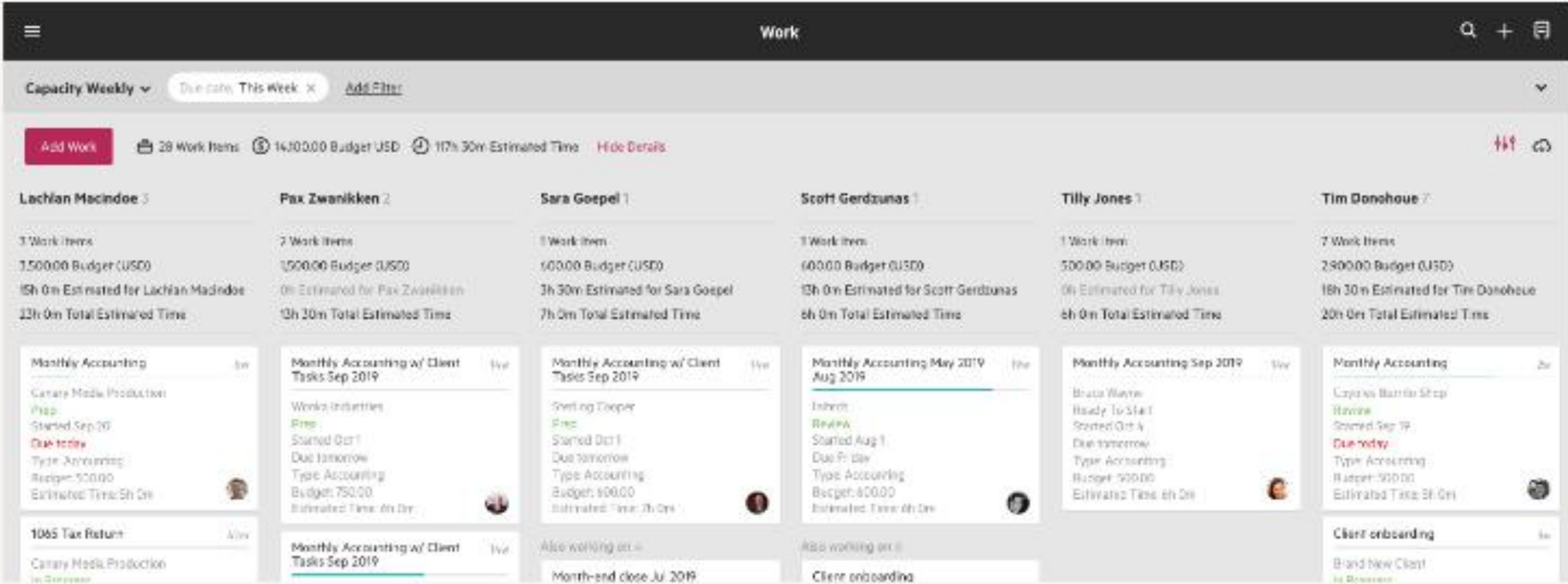
Dashboard name: Capacity Weekly
Filters: Due date = This week; Overdue
Columns sorted by: Assignee

View the work items assigned to each team member over a period of time, monitor workload and capacity, and redistribute work as needed.

You might find it useful to add a due date filter, and only show work items that are due this week or overdue. This allows you to see a digestible amount and highlights the highest priorities.

Look at the estimated time totals for every team member to compare everyone's workload and capacity in the short-term.

Advanced tip: Create a new user in your team called “1 – New Client Queue”. Any new work items for newly signed clients can be assigned to this user, ready for you to drag & drop and assign to a team member who has the capacity to take that work on.

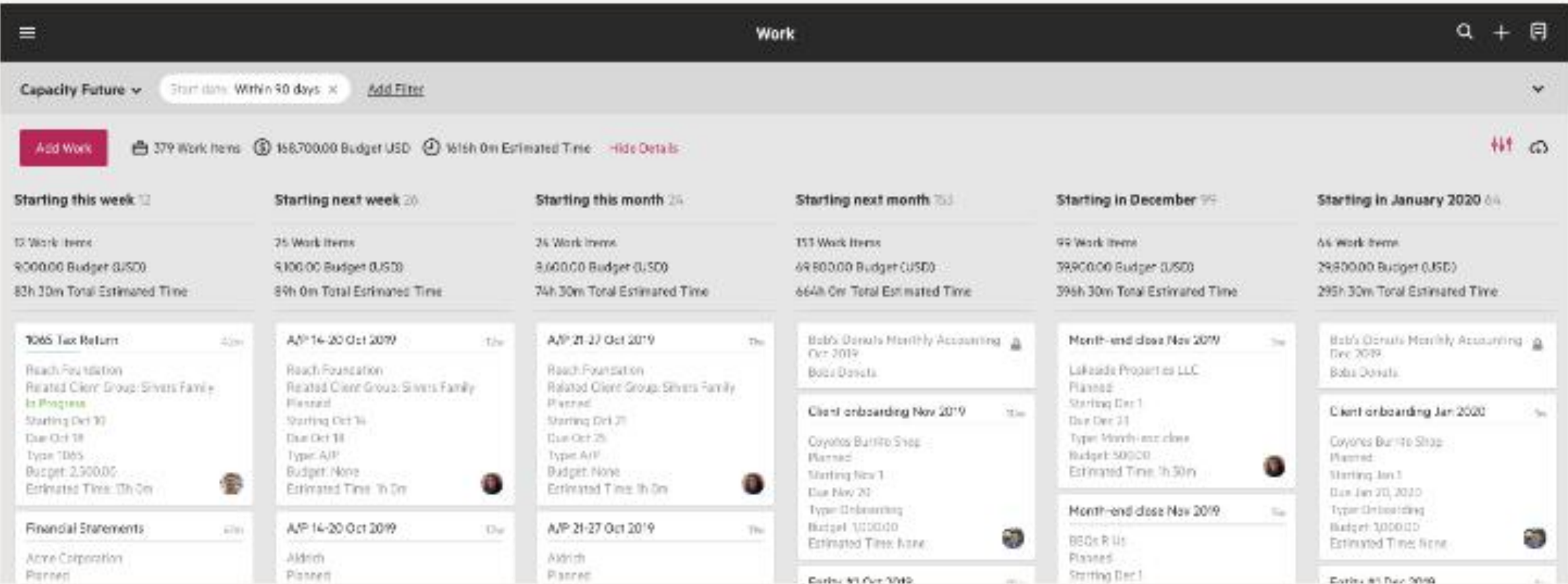


Plan for future capacity and understand hiring needs

Dashboard name: Capacity Future
Filters: Start date = Within 90 days
Columns sorted by: Start date

This second capacity view focuses on work scheduled for the short to mid-term. Filter by start date and choose a time period to show every confirmed work item scheduled to begin within the chosen period. Predict how busy your team will be and determine the right time to hire someone new.

You can replicate this dashboard for specific teams, work types, clients or more, by adding more filters on top of one another.



12 Karbon work dashboards that will give you complete clarity

<http://bit.ly/2VQydo9>

Demonstration in Karbon

Wrap up

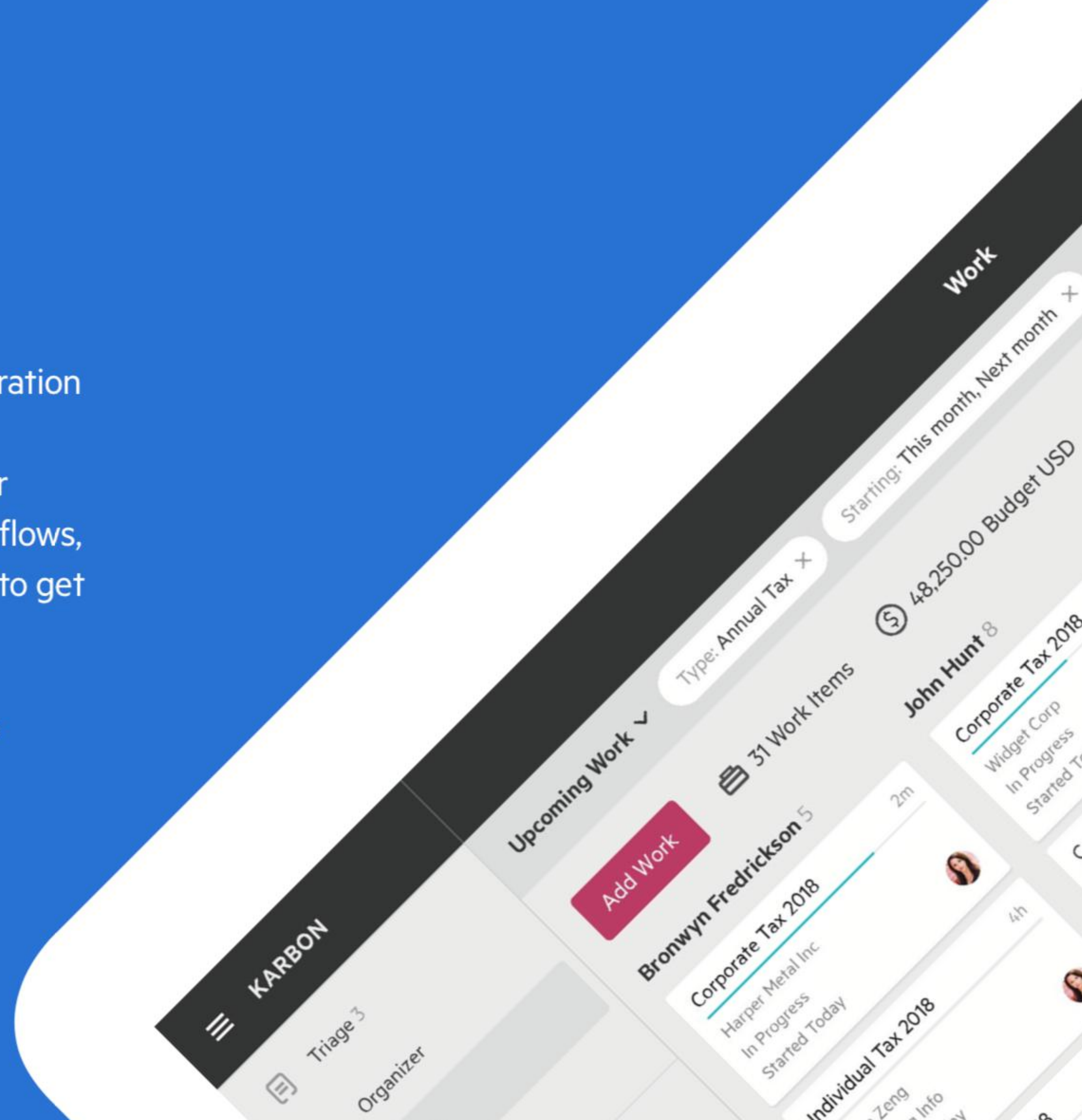
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How work gets done.

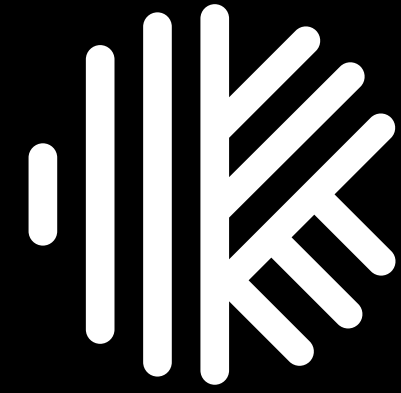
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Learn how you can maximize your team's output with Karbon.

Visit karbonhq.com



Questions?



Thank you

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@KarbonHQ

ian@karbonhq.com | andi@karbonhq.com

