

SmartSuite

Project & Portfolio Management > Project & Program Execution ·
Datasheet

Resource Management

Plan, allocate, and optimize resources with real-time visibility into capacity, utilization, and demand across projects and teams.

Specification

SKU	PPM-EXE-RES
Solution area	Project & Portfolio Management
Works with	Project Management, Program Management, Portfolio Management, Project Financial Management, Strategy & OKR Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Resource Management is the process of planning, allocating, and optimizing people and resources across projects and initiatives. It ensures that organizations have the right capacity to deliver work effectively while avoiding over- or under-uti

SmartSuite's Resource Management software provides a structured, scalable system to plan, allocate, and optimize resources across projects, programs, and portfolios. It enables organizations to move from reactive staffing decisions to proactive capacity planning aligned with business priorities.

With a centralized system of record, teams gain full visibility into who is working on what, how resources are utilized, and where gaps exist.

Core capabilities

Capacity Planning & Forecasting

Plan resource availability based on demand and timelines.

Resource Allocation & Scheduling

Assign resources across projects, programs, and tasks.

Utilization Tracking

Monitor workload and efficiency across teams.

Skills & Role Management

Align resources based on expertise and responsibilities.

Workload Balancing

Identify and resolve over- or under-utilization.

Cross-Project Visibility

View resource allocation across all initiatives.

Integration with Financials

Link resource usage to cost and budget tracking.

Real-Time Dashboards & Reporting

Track capacity, utilization, and performance metrics.

Role-Based Access Control

Ensure appropriate visibility across teams.

The Resource Management Lifecycle

Step 1 Plan Capacity Define available resources and forecast demand.	Step 2 Allocate Resources Assign resources to projects and initiatives.	Step 3 Monitor Utilization Track workload and performance in real time.	Step 4 Adjust Allocation Rebalance resources based on changing priorities.	Step 5 Optimize Performance Continuously improve efficiency and alignment.
--	---	---	--	--

Who it is for

Resource Manager Plans and allocates resources across initiatives.	Portfolio Manager Aligns resources with priorities.	Program Manager Coordinates resources across projects.
Project Manager Assigns and tracks team workload.	Operations Leader Ensures efficiency and utilization.	Executive Leadership Monitors capacity and performance.

Works with

Project Management Tracks task-level assignments.	Program Management Coordinates resources across initiatives.
Portfolio Management Aligns resources with priorities.	Project Financial Management Tracks cost of resource allocation.
Strategy & OKR Management Ensures resources support strategic goals.	

Built differently. Resource Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Resource Management configured for your organization, or read the full product entry at smartsuite.com/products/resource-management.

Schedule a demo