Team capacity optimization planner

Overview

This tool is designed to help you take a strategic, team-wide view of how work is distributed, where capacity gaps or overload exist, and how to align resourcing with goals.

It bridges the gap between people planning and operational delivery by making capacity visible, measurable, and actionable.

When done well, this type of planning improves:

- Performance and productivity
- Employee satisfaction and engagement
- Burnout prevention and retention
- Cross-functional alignment

Use this planner:

- At the start of a new quarter or planning cycle
- When project priorities shift significantly
- After hiring or losing team members
- When you're seeing signs of strain, missed deadlines, or uneven workloads
- During budgeting or resourcing conversations with leadership

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1. Define your planning period and priorities

Instructions: Set the scope and context for your capacity review.

Planning period: ______________________________ (e.g. Q3, Sprint 14, Sep–Oct)

Business priorities this cycle:

→ ____

→ ____

→ ____

Known constraints or pressures (e.g. holidays, launches, hiring gaps):

→ ____

→ ____

2. Map priority workstreams and owners

Instructions: Identify the key workstreams/projects and who owns or contributes to them.

Workstream/ project	Description	Owner(s)	Team members involved	Time sensitivity (High/Med/Low)
Product launch campaign	New product GTM across channels	Jamie	Alex, Sam, Nina	High
Internal ops redesign	Streamline meeting and reporting processes	Taylor	Ops + HR	Medium
Customer insight report	Quarterly customer data deep-dive	Sam	Data + CS	Low

Use this to visualize where your team is focused and spread thin.

3. Establish shared BAU categories and definitions

Instructions: Before assessing individual capacity in the next section, define a consistent set of Business-As-Usual (BAU) categories that all team members will use when reporting their weekly time allocation. This ensures clarity, comparability, and avoids ambiguity in how BAU work is labeled.

Step 1: Create team-wide BAU categories
List the core recurring activities that form the majority of day-to-day work. Example for a marketing team:

- Emails & admin
- Copywriting & content production
- Socials management & scheduling
- Internal meetings & collaboration
- Project-based work
- Reactive requests/inbound
- Reporting & analytics
- Stakeholder communication

Team BAU categories for this cycle:

→ ____

→ ____

→ ____

→ ____

→ ____

Step 2: Define what belongs in each category

Provide clear descriptions so everyone is tagging their time consistently.

→ Category name: ____

Definition: ____

Examples of tasks included: ________________________________

(Repeat as needed)

4. Assess current individual capacity and allocation

Instructions: Review how each person's time is currently allocated across projects, BAU work, and non-project contributions.

Team member	Total available hours/week*	% Allocated to projects	% Allocated to BAU	Stretch risk (L/M/H)	Notes
Alex	38	70%	30%	High	Working overtime for last 2 weeks
Sam	35	40%	50%	Medium	Asked for more strategic tasks
Taylor	32 (adjusted for PTO)	80%	10%	High	Needs admin support

**Adjust hours for part-time, PTO, or flexible arrangements*

NB: Pay attention to hidden work like people management, mentoring, or cross-team support.

5. Spot inefficiencies and capacity risks

Prompts to guide analysis:

- Who is at or over 90% allocation consistently?
- Who has space for new work or development opportunities?
- Are high-priority projects under-resourced?
- Are BAU or reactive tasks crowding out strategic work?
- Are we relying too heavily on specific individuals or skillsets?

Observation or concern	Impact or risk	Suggested follow-up
Alex overloaded again	Burnout risk, quality issues	Shift admin work, limit meetings
Taylor carrying all ops work	No redundancy	Cross-train junior staff or add backup
Customer insight project light on resources	May not meet deadline	Reallocate 5 hours/week from Sam

6. Plan and implement adjustments

Instructions: Based on the analysis, define what needs to shift, what support is required, and who will do what by when.

Action or adjustment	Owner	Deadline	Dependencies or approvals needed
Reassign ops tasks to junior analyst	Taylor	Next Friday	Training time from Taylor
Request freelance design support	Alex	EOD Tuesday	Budget approval from finance
Cancel non-essential team reporting meeting	Manager	Immediately	Communicate to all

7. Build in buffer and flexibility

Even the best plans hit roadblocks. Account for reactive work, sick days, delays, and scope creep.

Prompts:

- Can you build 10–15% unallocated “buffer” into team schedules?
- Are there projects that can be paused or sequenced later if needed?
- Have you planned contingencies for key-person risk?

Buffer strategies	Owner	Notes
Block 3 hours/week per person for flex	Each team member	Adjust calendar visibility
Maintain backlog of “nice-to-haves”	Project manager	Revisit mid-quarter
Document SOPs to reduce key-person reliance	Alex	End of month

8. Set review rhythm and feedback loops

To make capacity planning stick, it needs to become a regular conversation—not a quarterly panic.

Prompts:

- How often will you review team capacity? (weekly/monthly?)
- What data will you track? (e.g. time tracking, check-in pulse, workload scores)
- How will team members raise concerns between reviews?

Check-in format	Frequency	Owner	Notes

15-min "Capacity Corner" in weekly team meeting	Weekly	Manager	Green/Amber/Red system
Monthly project resourcing review	Monthly	Ops lead	Flag scope drift or overload early