

Resource Allocation Plan Template

Financial Planning & Budget Ownership — Sample Template

Instructions

Reallocate headcount and budget by department each quarter based on priority, not habit. Every shift should tie back to a named strategic priority.

Allocation — Worked Example

Department	Headcount	% of Budget	Priority Tier	Next Review
Product & Engineering	14	48%	Tier 1	Quarterly
Sales & Partnerships	6	20%	Tier 1	Quarterly
Marketing	4	12%	Tier 2	Quarterly
Operations & People	5	14%	Tier 2	Quarterly
G&A	2	6%	Tier 3	Semi-annual

Blank Allocation Plan

Department	Headcount	% of Budget	Priority Tier	Next Review

Notes

Product & Engineering allocation increased 6 points this quarter to support the platform migration; reviewed against the strategic plan before approval.