Beyond Spreadsheets: Elevating Resource Management with AI & Real-Time Insights

Charles Gustine

Director – Customer and Market Insight

Kantata

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Agenda

1 Understanding the Status Quo

2 The Cost of Reactive Resourcing

3 From Checkers to Chess to 3-D Chess

4 What Determines What Optimal Looks Like?

5 Time – The Fourth Dimension

6 Key Takeaways: Strategizing Like a Grandmaster

Understanding the Status Quo

Inhibitors to Effective Resource Management

Process

▶ **58%**

of PS orgs say their current RM process is not consistently followed

▶ **49%**

Although organizations believe forecasting is important, only 49% have a formalized and documented process.

Priority

▶ **53%**

of PS orgs say lack of organizational and/or executive support for RM is one of their largest inhibitors to effective resource management

A Prison of Spreadsheets

▶ **37%**

of PS orgs are not using a commercial solution to automate RM currently, relying on spreadsheets (15%) or a tool developed in house (22%) instead

▶ **75%**

3/4 of respondents are still using spreadsheets to support their resource forecasting needs
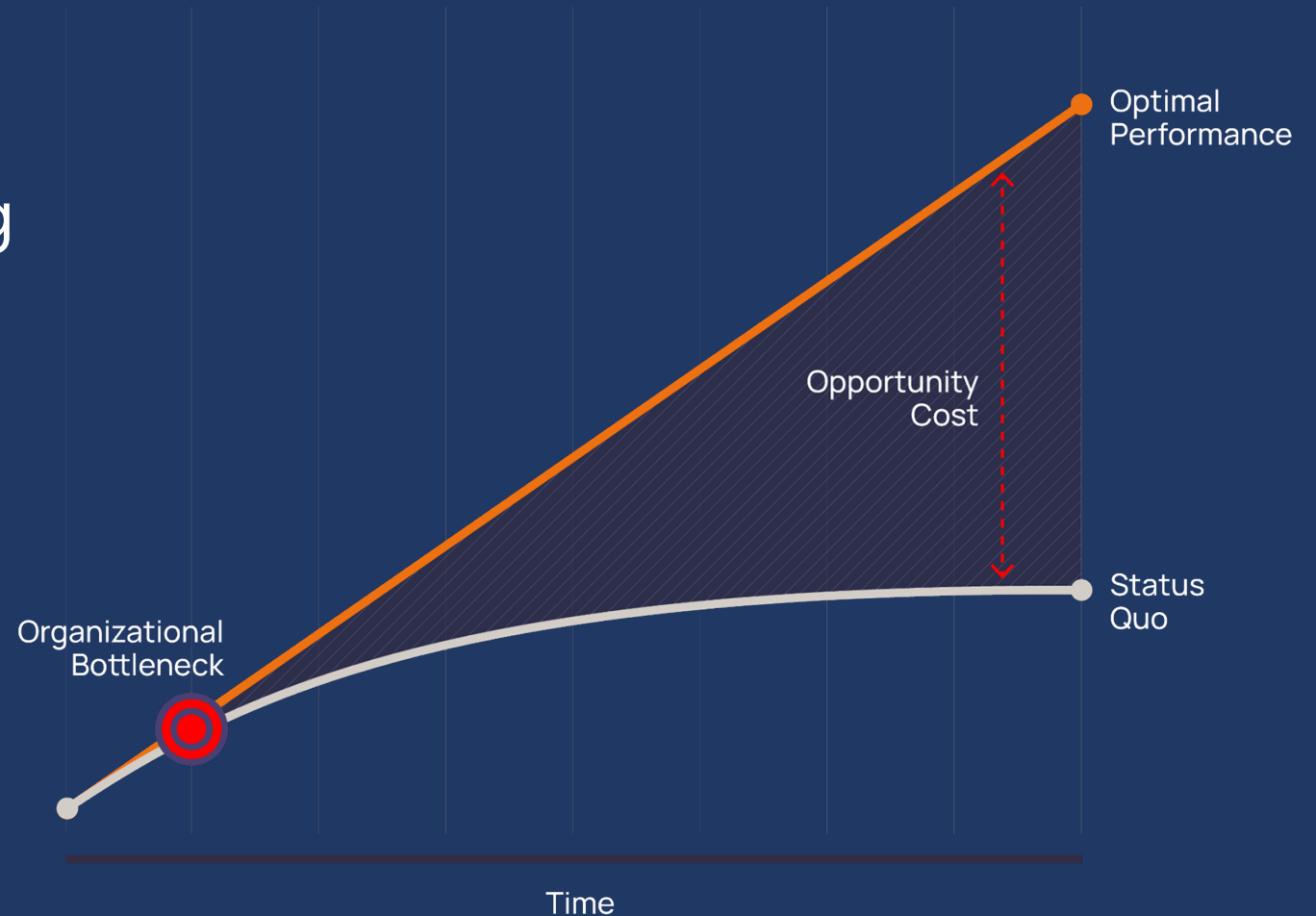
The Cost of Reactive Resourcing

Do you know how much reactive resourcing is costing your business every month?

"

I don't trust the information I'm seeing across the pipeline and ongoing projects enough to make proactive staffing or hiring decisions..."

Optimal Performance

Opportunity Cost

Status Quo

Organizational Bottleneck

Time

"The chess board is the world, the pieces the phenomena of the universe, the rules of the game are what we call the laws of nature. The player on the other side is hidden from us. All we know is that his play is always fair, just and patient. But, also, that he never overlooks a mistake or makes the smallest allowance for ignorance.

To the man who plays well the highest stakes are paid with that sort of overflowing generosity with which the strong shows delight in strength. And one who plays ill is checkmated without haste, but without remorse."
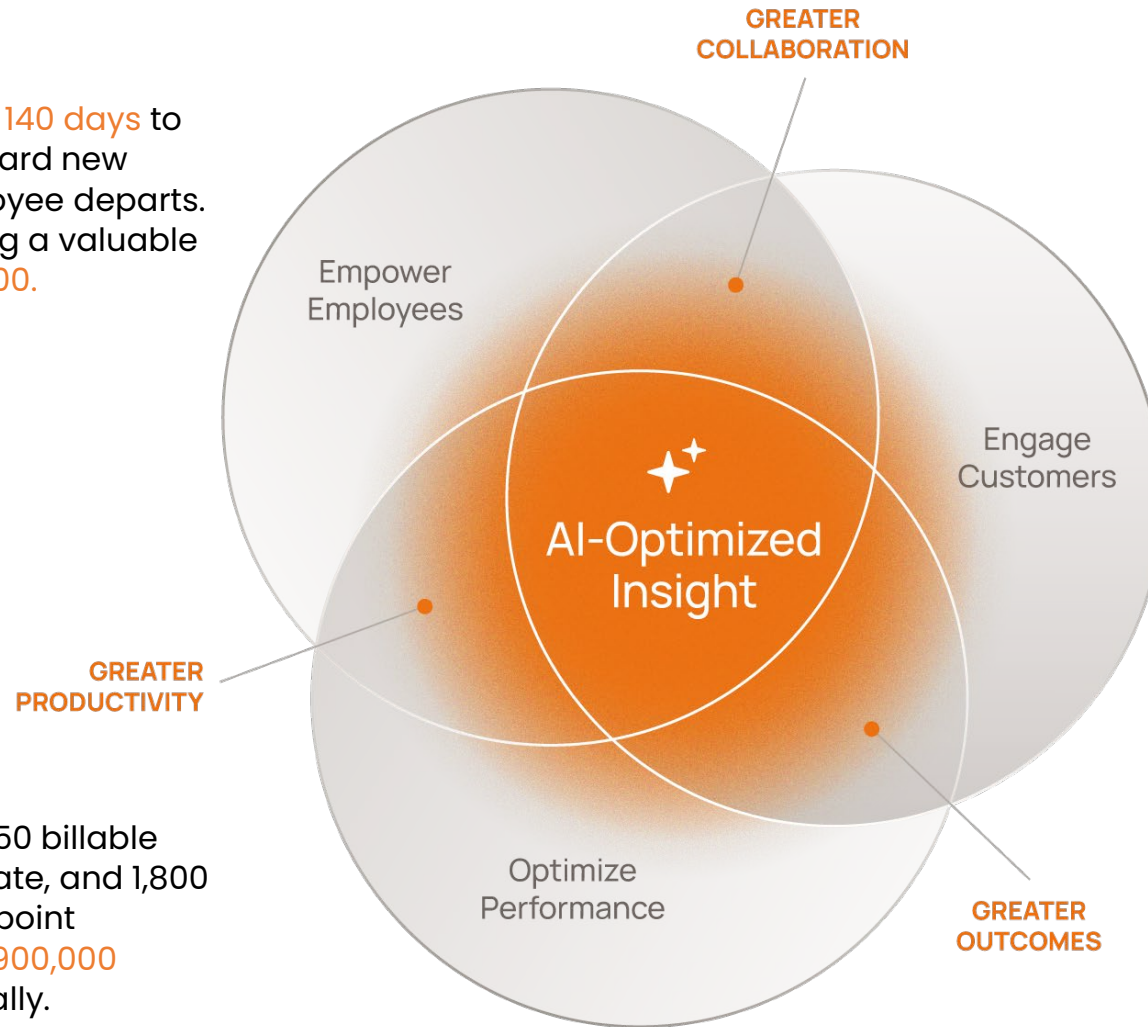
Thomas Huxley

Performance Improvements Add Up Fast

Here's what resourcing issues might be costing a business with 250 resources and a $200 blended rate every year according to SPI benchmark data:

		FROM	TO	RESULT
	Admin Time	157 hrs SPI Level 2: PILOTED	142 hrs SPI Level 3: DEPLOYED	**+$750,000**
	Non-Billable Project Time	144 hrs SPI Level 2: PILOTED	99 hrs SPI Level 3: DEPLOYED	**+$2,250,000**
	Bench Time	110 hrs SPI Level 2: PILOTED	93 hrs SPI Level 3: DEPLOYED	**+$850,000**

Every year this business sticks with "good enough", they're missing out on: +$3,850,000

Source: *SPI Professional Services Maturity Benchmark, 2024*

Resourcing Constraints Have Sweeping Impacts

On average, it takes about 140 days to find, recruit, hire, and onboard new consultants after an employee departs. The actual cost of replacing a valuable consultant exceeds $150,000.

For an organization with 250 billable resources, a $200 hourly rate, and 1,800 base FTE, every utilization point increase correlates to a $900,000 increase in revenue annually.

Project overruns impact client referenceability. Fewer than 5% of projects overrunning correlates to greater than 73% referenceability; more than 30% of projects overrunning decreases references by 18%.

GREATER COLLABORATION

Empower Employees

Engage Customers

AI-Optimized Insight

GREATER PRODUCTIVITY
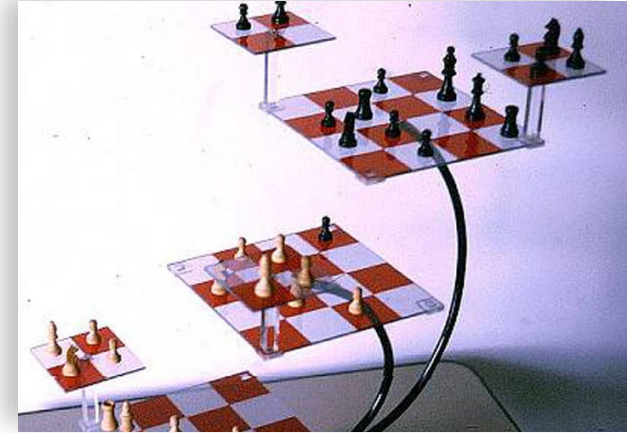
Optimize Performance

GREATER OUTCOMES

From Checkers
to Chess to 3-D Chess

"It was a good day – I found a resource for every project!"

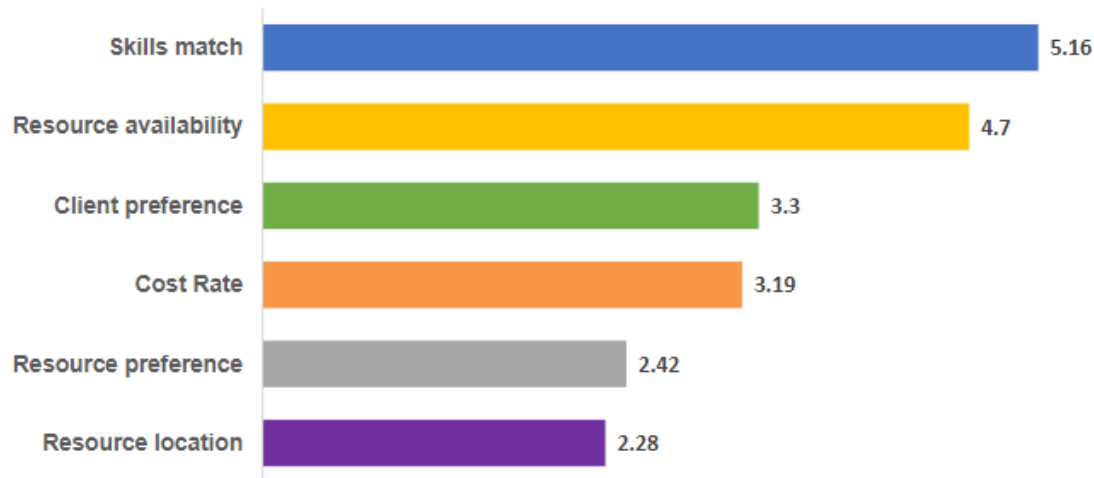"It was a **great** day – I found a **project** for every **resource**!"

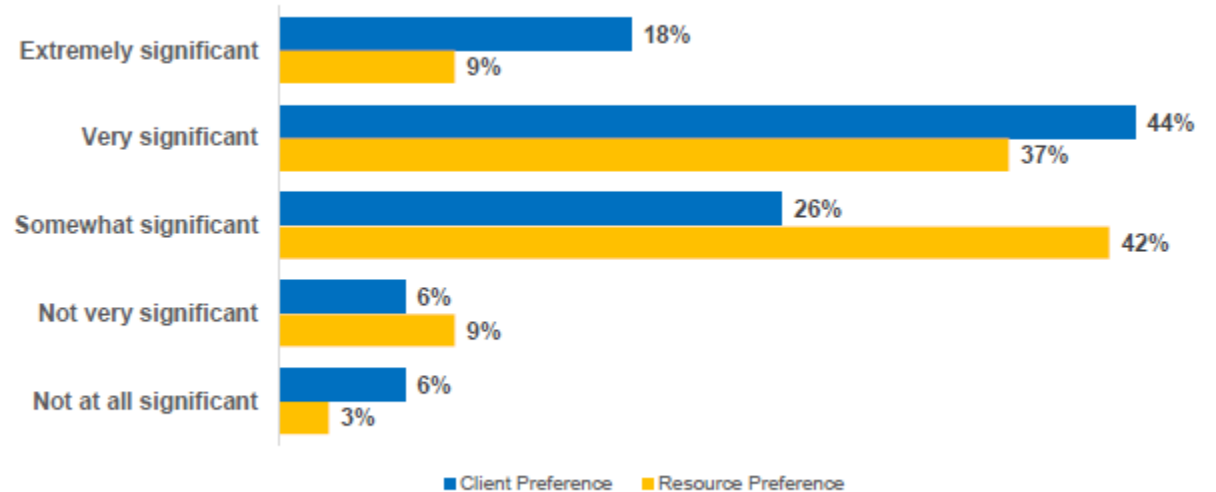"It was a **fantastic** day – I matched every resource to their optimal project!"

What Determines What Optimal Looks Like?

Client and resource preference may not be the most important staffing criteria...
...but they are very important criteria for making optimal staffing decisions.

The criteria for making staffing decisions, ranked by importance on a 1-6 scale

Criteria	Score
Skills match	5.16
Resource availability	4.7
Client preference	3.3
Cost Rate	3.19
Resource preference	2.42
Resource location	2.28

How significant is client preference and resource preference for making staffing decisions?

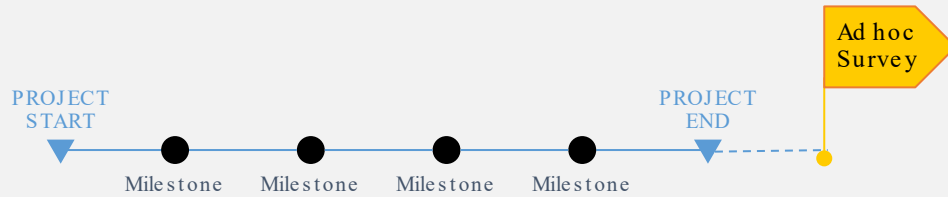|	Client Preference	Resource Preference
Extremely significant	18%	9%
Very significant	44%	37%
Somewhat significant	26%	42%
Not very significant	6%	9%
Not at all significant	6%	3%

Client & Team Feedback is Crucial for Optimizing Staffing Strategies

The majority of PSOs acknowledge the importance of project sentiment data in improving staffing outcomes, but lack the tools to ensure those insights are consistently surfaced.

▶ **89%**
of RM practitioners say real-time feedback on satisfaction throughout project delivery would be useful

▶ **23%**
of RM practitioners say they receive frequent updates on client satisfaction with projects they've staffed

▶ **18%**
of RM practitioners say they receive frequent updates on resource satisfaction with projects they've staffed

▶ **81%**
of RM practitioners say client satisfaction data related to project delivery is stored separately from other core project data

Source: RMI Survey Series, RM Staffing Strategies, 2024

A New Approach Is Emerging

Current Approach

PROJECT START
PROJECT END
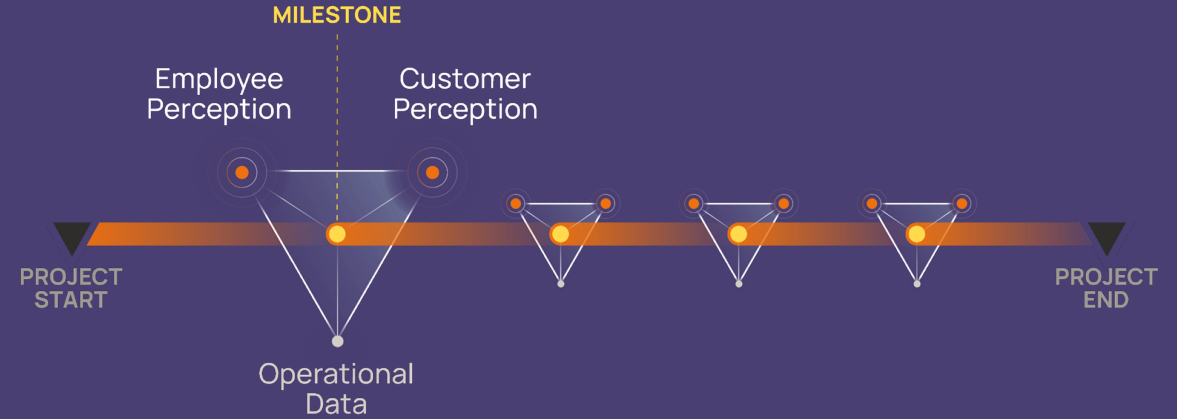Milestone   Milestone   Milestone   Milestone
Ad hoc Survey

❌ Feedback too late to impact project outcome

Challenges:

- Difficult and time consuming to craft & send custom surveys
- Too little, too late to affect change on current project.
- Disconnected from project data and reporting tools

Better Approach

MILESTONE
Employee Perception
Customer Perception
PROJECT START
Operational Data
PROJECT END

✅ Proactive insights throughout duration of project

Kantata "Pulse Checks"

- Triangulates (A) customer perception, (B) employee perception, and (C) operational performance, at key milestones during every project
- Identify the trainwrecks before they happen, to keep projects on track
- Correlate quality and performance trends within, and across projects
- Flexibility to embed feedback collection and data into the delivery ecosystem as well as ad hoc Pulse checks

Fragmented Data Creates Fragmented Insights

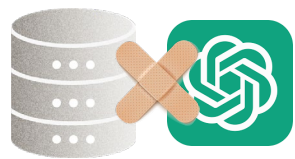PS leaders say their top strategic goals for GenAI in the next 5 years are:

Increasing Efficiency	100%
Innovating Service Offerings	98%
Reducing Costs	96%
Enhancing Client Engagement	91%

Yet only **10% of Professional Services firms** are beyond the early stages of AI Adoption*

*SPI Research Sept 2024
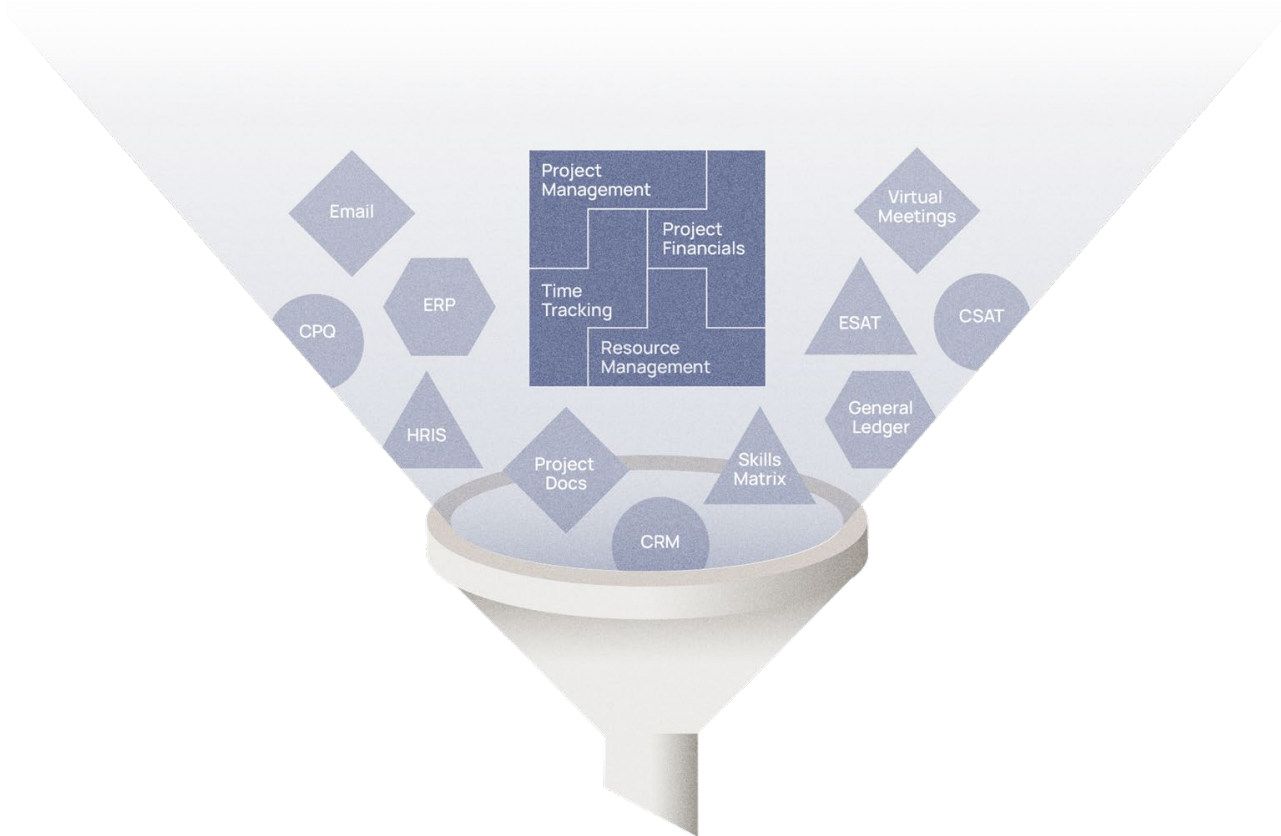
Data Warehouse + LLM

What common themes of project delivery are leading to lower CSAT scores

Sorry I do not have the context to fulfill that request

Vertical Services-Specific SaaS Unlocks AI's Potential

	Sell	Resource	Deliver	Bill
Insights	Automate & Guide Scoping	Smart Skills, Conflicts & Scenarios	Drafts Reports & Updates, Automate Time	Automate Bills & Closing
Predictions & Benchmarks	Win Rates & Forecasts	Start/End Dates, Skills, Attrition	Progress, Risks, Delays, Productivity	Revenue, Margin, Cash
Optimization	Client Outcomes	Talent Stability	Services Quality	Services Futurecast
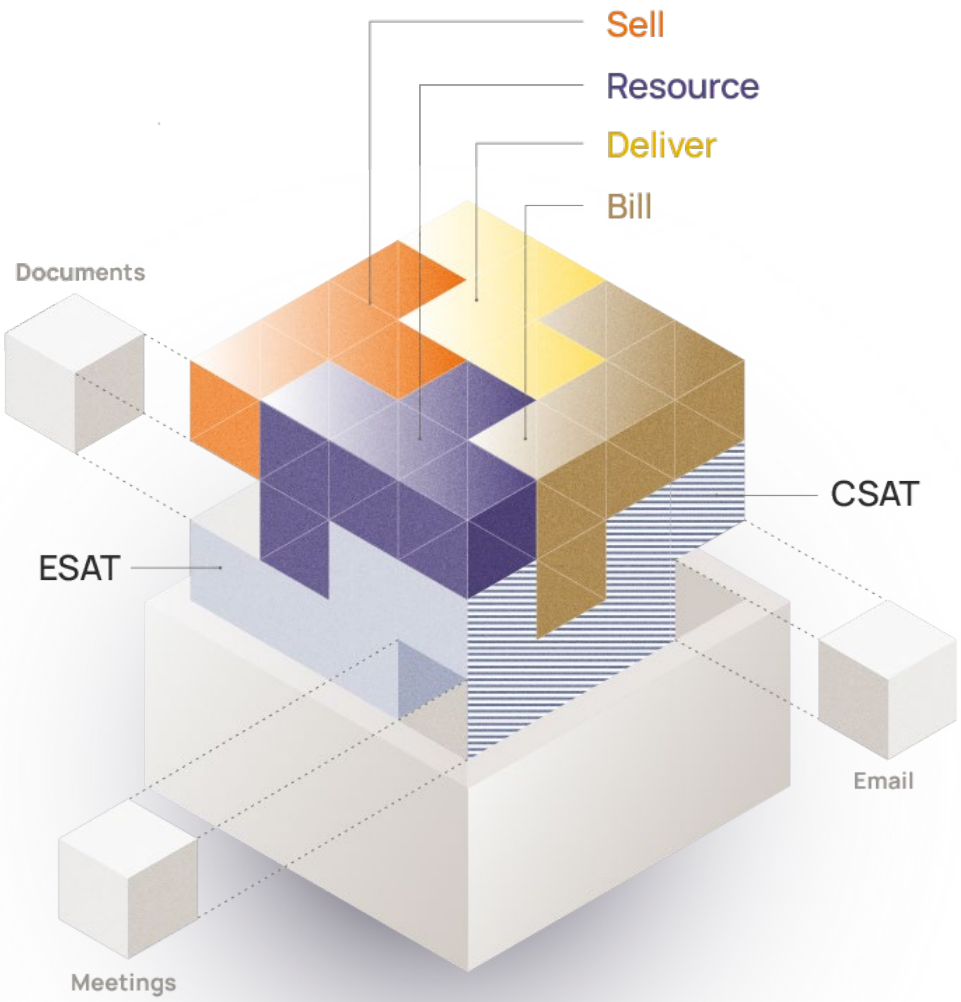
Vertical Services-Specific SaaS Unlocks AI's Potential

Staffing Optimization

Vertical Services-Specific SaaS Unlocks AI's Potential


✧ Here is a preview of the changes you requested.

Task Name	Start Date (previous)	Start Date (new)	Due Date (previous)	Due Date (new)
Create Presentation	Jan 6, 2025	Jan 22, 2025	Jan 14, 2025	Jan 30, 2025
Document Recos	Jan 6, 2025	Jan 22, 2025	Jan 14, 2025	Jan 30, 2025
Project Review	Jan 14, 2025	Jan 30, 2025	Jan 14, 2025	Jan 30, 2025
Presentation Recos	Jan 17, 2025	Feb 7, 2025	Jan 17, 2025	Feb 7, 2025

Hours for these people will shift to the new dates :
1. Rebecca Norton - Analyst
2. Christy Dalton - Design Director
3. Sara Anderson - Project Manager
4. Shripati Philip - Sr. Analyst
5. Francoise Milford - Technical Consultant
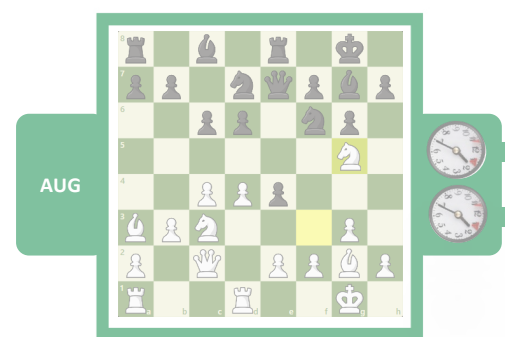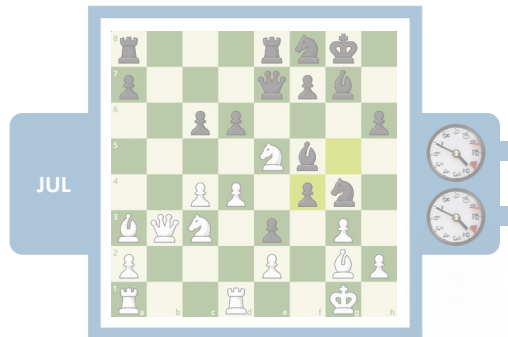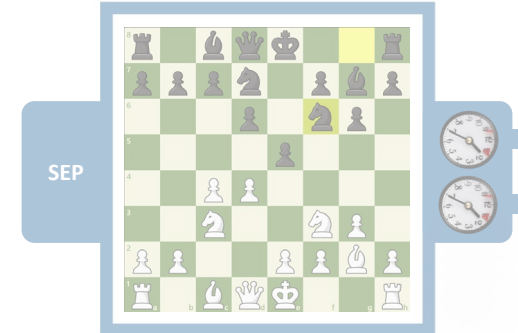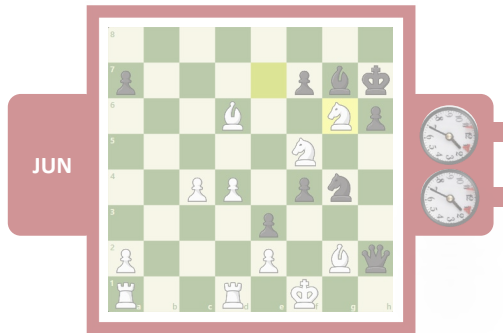6. Damien Lewis - Financial Analyst

Cancel   Confirm Update

Tailored GenAI Actions   — Coming Soon

Sell
Resource
Deliver
Bill

Documents

CSAT

ESAT

Email

Meetings
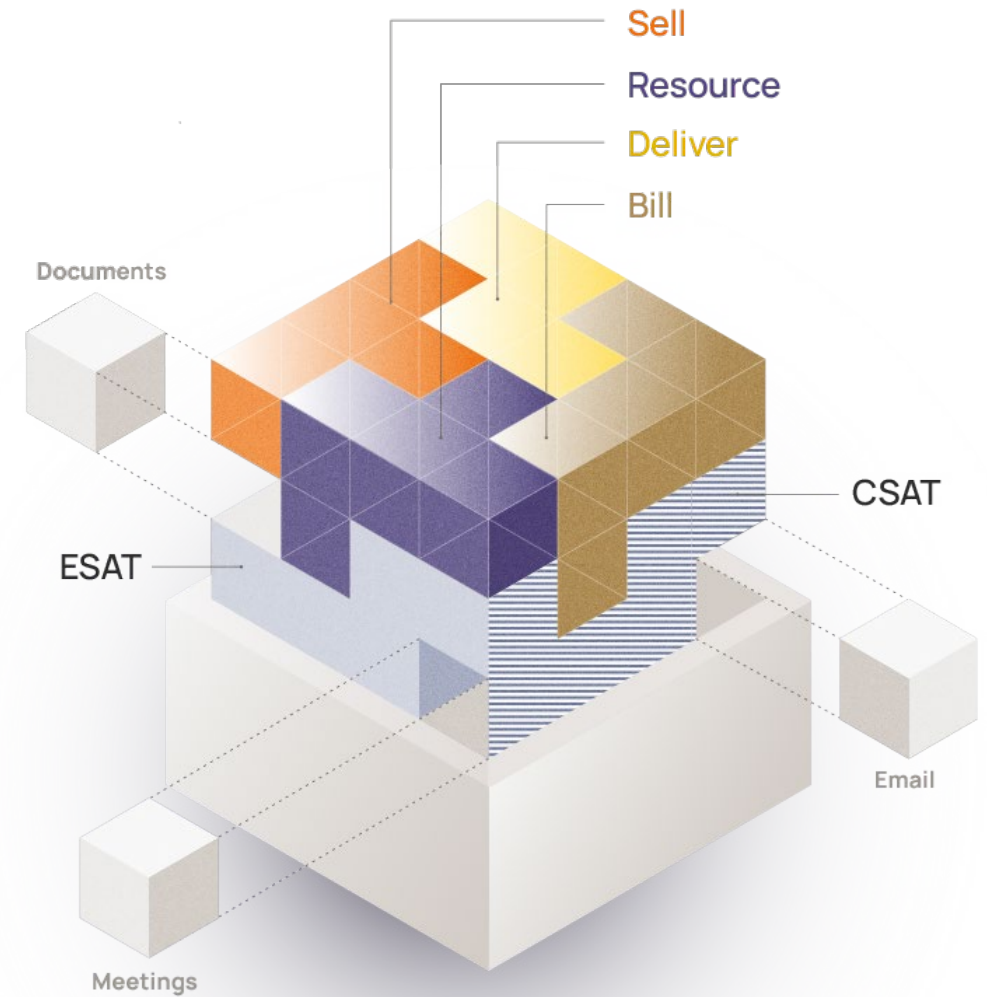
Mastering Time – The Fourth Dimension

How Running PS Is Like Simultaneous Chess

MAY

JUN

JUL

OCT

SEP

AUG
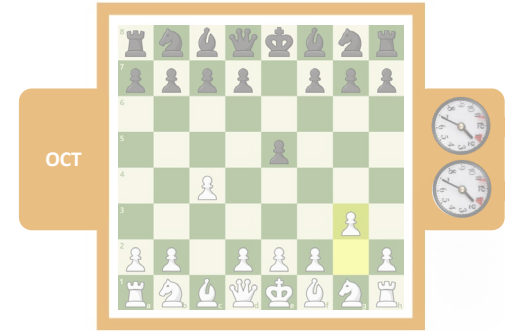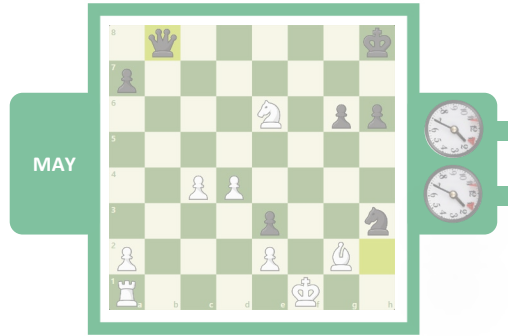
Strategizing Like a Grandmaster

30-DAY PLAN

Managing the endgame

1. Fill the gaps
2. Optimize resource allocation on each project
3. Start early on new work

60-DAY PLAN

Thriving in the middlegame

1. Review the resources on each project
2. Get underutilized resources onto billable projects
3. Manage demand from existing customers

90-DAY PLAN

Mastering the opening

1. Assess skill sets and look for opportunities to recruit
2. Ensure vacation time is spread across the year
3. Get new staff billing sooner

Embracing Change in Action

BEFORE

"Logicalis had a PSA but we didn't use it as such. [Because of issues with] integration and data flows, it made it so we could only use it for timesheets and expense systems. Everything else was reported in spreadsheets.

We realized that some of our processes were going to have to change to enable us to work in a more streamlined way.

It would have taken me a month to do my demand forecast. So we just didn't do it, it was based on gut feel."

AFTER

"We now have a complete and accurate view of all engagements happening over the next six months. That means instead of relying on a combination of gut feel and spreadsheets, I can confidently put together the best teams for each engagement and press the button on the recruitment process much sooner.

When we share the rolling three-month forecast across the business, people know they can trust it. Having confidence in the forecast means we can have conversations we wouldn't otherwise have.

To be able to confidently stand there in front of the practice heads and speak about our demand is a great place to be. A year ago, I wouldn't have even had the conversation."

Mike Downes, Resourcing Director, Logicalis UK

LOGICALIS
Architects of Change

Questions

RMI 2025 RESOURCE MANAGEMENT GLOBAL SYMPOSIUM
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LEARN. COLLABORATE. INNOVATE.

Thank You!