



ENGAGE

20% Tool, 80% Truth

What Our Resource Planning Software Implementation Taught Us About Quote-to-Cash Readiness

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Agenda

- 1** The premise: 20% tool, 80% truth
- 2** The business case & quote-to-cash lifecycle
- 3** What carried the rollout
- 4** The gaps we found
- 5** 90 days live: the honest view
- 6** The readiness checklist & one thing to do Monday



THE PREMISE

Resource Planning Software readiness is **20% about the tool —**
and 80% about the data, financial rules, rank mappings, and standardized processes feeding it.

This session is not a success lap. It's the readiness playbook — what carried us, what we were missing, and what surfaced only once the system was switched on.

THE COMPELLING BUSINESS REASON

We weren't buying a staffing tool. We were fixing quote-to-cash.

The old world: fragmented, manual tools — a supply-based staffing tool, a homegrown skills database with questionnaire, a scheduling power app, and an Excel-based budgeting form — with no line of sight from a proposal to the cash it eventually generated.

The mission: move the firm's quote-to-cash capability to the **top quartile of maturity** — one connected platform for budgeting, staffing, scheduling, and engagement economics.

The reframe that mattered: *sell the lifecycle and real time project management, not the software. That's what unlocked the investment.*

THE QUOTE-TO-CASH LIFECYCLE

1

Create opportunity

CRM

2

Plan, budget & staff

Resource Planning Software

3

Deliver & recognize

Client acceptance & delivery

4

Bill, collect & report

Billing & collections platform

What the investment was expected to buy



One platform

Firmwide demand intake and skills-based staffing across Audit, Tax, and Advisory — replacing four disconnected tools.



Real-time economics

Engagement margin visible as work happens, so leaders spot margin risk before erosion — not at month-end.



A global workforce

Direct off-shore staffing and activation of available labor pools to support organic and inorganic growth.



Decision support

Utilization gains, fewer unplanned write-offs, and forward-looking capacity insight for the practice.

Bottom line: *the value story was easy to sell. The hard part — and the rest of this talk — was everything upstream that had to be true first.*

A committed RM team and an embedded champion network drove delivery



A fully committed RM team

A dedicated resource management team — not borrowed capacity — owned the rollout end to end and stayed the delivery engine throughout.



SMEs embedded in every service line

Multiple SMEs per service line designed alongside their business champions, start to finish — so the build reflected how each practice actually works.



A bi-weekly champion cadence

Bi-weekly calls with the full business team drove updates, alignment on key decisions, the UAT approach, and the training schedule — and champions co-led webinars with engagement managers and partners.



RM-led hypercare

A robust hypercare plan run by the RM team — daily calls and live chat communities kept support close and issues moving.



An AI agent + searchable knowledge base

A searchable AI agent and user guides deflected common questions — rated a clear strength in our OCM retrospective.

The tool didn't deliver itself — a committed team and an engaged business did. That's the part you can't buy.

One thread ran through everything: the CRM engagement ID



CRM engagement ID — 1:1 across a resource-planning engagement, a delivery assignment, and a billing client assignment code

The lesson underneath the diagram: The data direction, not the tool, decides success



THE HEART OF THE TALK

What we didn't have — and what it cost us

Every gap below became visible only because the tool demanded data and process we assumed we already had.

The data and financial foundations weren't ready



The CRM was the hidden dependency

The resource planning software is downstream of CRM. Dirty or stalled opportunity stages meant engagements stuck in Draft, no budget snapshot, and staffing that couldn't start. Clean the CRM before go-live — not after. Uncover exceptions and ensure they have the correct mapping



Loading cost & bill rates took leadership buy-in

Margin can only be calculated once internal cost and bill rates are loaded — and that took leadership buy-in. A 1% misestimate can swing revenue by millions, so it had to be right. The payoff: engagement margin visible to engagement leadership, not hidden until month-end.



Clean mapping across CRM, the tool & finance

CRM, the resource planning software, and the financial system had to map cleanly so actual hours and revenue calculate correctly. The goal: forecast transparency in net revenue — not just hours.

Data readiness broke down — no end-to-end process or owner



No end-to-end data process

Data had to move from opportunity to cash across many systems, but no single process defined that flow — so gaps opened at every handoff.



Mapped across systems and owners

Every system held a piece of the data and had its own owner. Reconciling them fell to whoever was in the room, not to a defined data process.



No end-to-end system knowledge

Our technology team knew individual systems well, but no one owned or fully understood the full chain — so no one could predict where data would break.



Role clarity gaps

Business-architecture, testing-lead, and process-analyst roles were missing. Everyone pitched in — and everyone worked outside their lane.

Training was only as good as the process maps underneath it



Fragmented processes, no shared language

Each service line ran its own process, and the same word meant different things across them. There was no single “how we work” to teach.



No old-to-new translation

No one had ever documented how the old tools were actually used — so we couldn’t map the way people worked today to the way they’d work now.



Budgeting exposed it worst

The most complex workflow, and where the missing translation hurt most — but we hit the same wall in many other places.



So training slipped, then got rushed

With no maps to build on, enablement was compressed into the worst possible window — right before go-live, when attention was scarcest.

90 days live: close enough that the lessons are still sharp



Why 90 days is the right lens

Close enough that the readiness work is still raw. Far enough that I can tell you which gaps **actually bit us**.

Most of what we hit was pre go-live. The value of catching it early is that it never became an operational failure.

90 DAYS LIVE · THE LIVE UPDATE

What the readiness work prevented, and what's surfacing now

- **Adoption**
95%+ training completion within 1 to 2 weeks of go-live. Every user took general training; managers and above added engagement manager training.
- **Forecasting**
90%+ of active engagements forecasting hours. The monthly forecast cycle has run reliably since month one.
- **Run model & releases**
Product owner and release management now stood up. Cadence, testing and roles were not defined pre go-live, so we built that rhythm in the first 90 days.
- **What slipped**
Day 1 reporting. Core staffing data was live in 2 to 3 weeks. The deeper economics data is still being operationalized.

One win: monthly forecasting is now routine, not a fire drill. **One open item:** only half of engagements carry an active budget. The economics layer is next.

The readiness checklist — before you switch anything on

- | | |
|--|---|
| ✓ People live in HCM and integrated in Resource Tool | ✓ Skills captured in a structure you can search and staff against |
| ✓ Cost and bill rates loaded, owned and signed off | ✓ Charge codes defined and consistent |
| ✓ Every engagement budgeted in hours by role | ✓ Ranks mapped to cost & charge rates |
| ✓ One standardized global process | ✓ One shared ID linking every system end to end |
| ✓ CRM clean and stage-accurate | ✓ A named owner for the whole chain, not just each system |



ONE THING TO DO MONDAY

Decide what you're actually buying: one connected data flow — or a standalone tool.

“For us, that was the show-stopper. We wanted every resource request linked to the full engagement — which forces teams to budget in the tool, not around it. A standalone tool can't do that.”

The demo will lie to you → It works cleanly because it's not your data

Questions



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THANK YOU