



RMI *Survey Series*

Inhibitors to Effective Resource Management

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AGENDA

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PS/CS - Professional/Consulting Services
MA - Marketing Agencies
AATA - Accounting/Audit/Tax/Advisory
E/IT - Enterprise/IT
PD - Product Development

Survey Background

1

This was the third survey on RM inhibitors and now expanded to include five different project-based domains. The survey was conducted in 1Q/2022.

2

Input was provided from 39 different companies, by PS/EIT/PD/MA/AATA services executives, resource and project managers, production managers, and resource management office leadership.

3

Professional/Consulting services and Enterprise/IT services made up 83% of the respondents. Recently added to the Survey Series is input from Accounting, Audit, Tax and Advisory organizations. These project-based domains share many of the same RM challenges offering good cross-industry perspectives leading to improved best practices.



Survey Questions

1

What type of organization do you represent?

- a) Professional or Consulting Services (PS or CS)
- b) Marketing Agency (MA)
- c) Enterprise/IT (E/IT)
- d) Product Development (PD)
- e) Accounting/Audit/Tax and Advisory (AATA)

2

Which option best describes your role?

- a) Resource manager
- b) Project manager
- c) RMO or PMO leader
- d) Delivery leader
- e) Operations
- f) HR
- g) Other

3

The largest inhibitors we have to effective resource management are due to (check all that apply):

- a) lack of dedicated and skilled resource managers
- b) lack of process design and/or implementation
- c) lack of automation tool(s) supporting the process

4

How many resource managers do you have across the enterprise?

- a) None
- b) 1-3
- c) 4-10
- d) 11-25
- e) 26-50
- f) 51+

5

We source resource managers:

- a) In-house
- b) External
- c) Both

6

How is RM process training primarily provided for resource managers?

- a) In-house with our own training materials
- b) RMI/RMCP
- c) We don't train resource managers on process
- d) Other

7

What training is available to your resource managers? (check all that apply)

- a) RMCP or other RM process training
- b) PSA/PPM/RPM automation tool training
- c) Soft skills training
- d) We don't provide training to resource managers
- e) Other

8

Regarding process support for resource management as an inhibitor, our current RM process (check all that apply):

- a) is not properly designed
- b) is not effectively implemented
- c) was not supported with good process training
- d) is not effective due to some other reason or a combination of factors
- e) RM Processes are not an inhibitor for us

9

For future process improvements we need/plan to develop better processes for (check all that apply)

- a) managing our skills inventory
- b) forecasting and capacity planning
- c) project staffing
- d) skills development and sourcing
- e) governance of our RM processes
- f) other

10

For automation of our resource management processes, we primarily use:

- a) PSA, PPM or RPM tool
- b) Spreadsheets
- c) In-house developed software

11

Regarding automation tool(s) support, our current tool(s) for RM support are

- a) effective and require no changes
- b) somewhat effective but could be improved
- c) a known area for improvement
- d) we are planning to replace one or more of our automation tools supporting RM

12

Current inhibitors in our automation support for RM include (check all that apply):

- a) lacks features we need
- b) not configured properly to support our RM process
- c) lacks integration with our other front and back office system(s) for forecasting
- d) lacks sufficient dashboard capabilities and/or reporting
- e) lacks data analytics
- f) we have no issues with our current automation support for RM

13

If you listed data analytics as an inhibitor in previous question, what data analytics capabilities would you want (check all that apply):

- a) better data integration with our front-end and back-end systems with relevant RM data
- b) ability to quickly generate 'what if' scenarios

14

Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply)

- a) skills inventory/database capabilities
- b) forecasting and capacity planning
- c) project staffing
- d) skills development planning
- e) reporting, dashboards and data analytics
- f) other

15

Are you using any kind of artificial intelligence features to support your resource management initiatives?

- a) Yes
- b) No

16

Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority):

- a) forecasting
- b) staffing projects
- c) staff development planning

Key Takeaways

1

Overall process and automation technology for RM/WFM continue to be opportunity areas for RMOs, while finding and growing talent for larger and more sophisticated RM environments are challenging in what is currently a tight labor market with a clear shortage of experienced resource managers (as reported in our last research report on profession of the RM/RMO leader).

2

Process design is getting more focus as the typical RMO matures RM/WFM processes in search of greater sophistication and capability. The RMI will continue to play an important role in industry process standardization with Just-in-Time Resourcing® and supporting training to aid the overall industry acceleration of progress in RM, providing a sound foundation for accelerating the improvement of RM/WFM outcomes.

3

Data strategies and capture will continue to be a critical lynchpin for acceleration of progress with the RM/WFM discipline as reflected in this report indicating demand for better dashboards, additional analytics, improved data integration, and potential applications for artificial intelligence (AI).

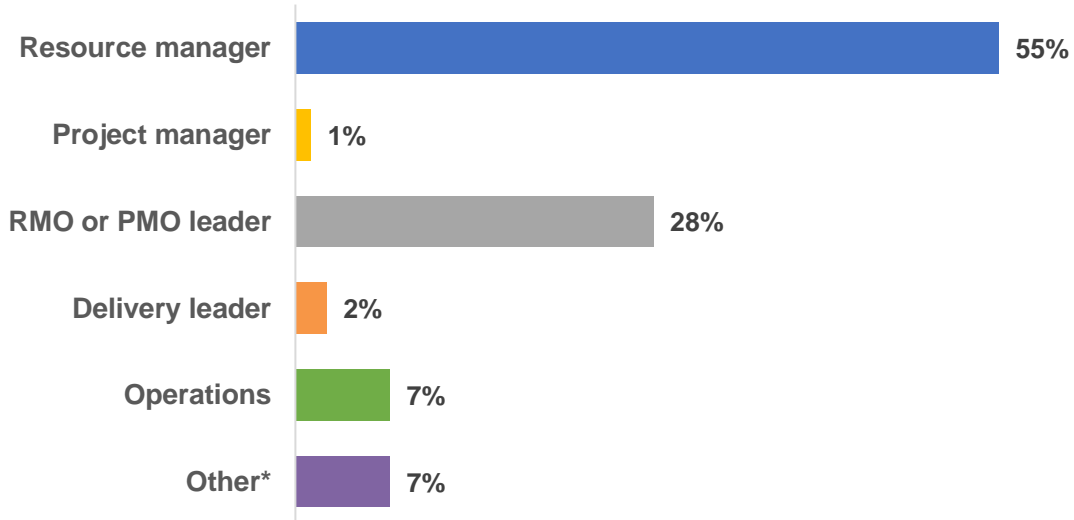




SERVICES TEAMS SERVING EXTERNAL CLIENTS

Professional/Consulting Services (PS/CS)
Marketing Agencies (MA)
Accounting/Audit/Tax/Advisory (AATA)

Q2: Which option best describes your role? – PS/CS, MA, AATA

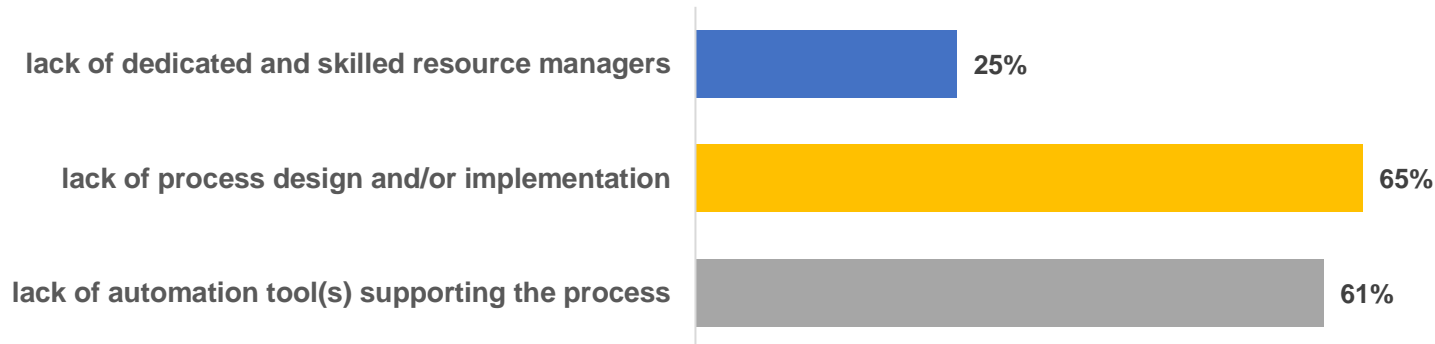


We had a good cross-section of respondents from various management and non-management roles.

Other:

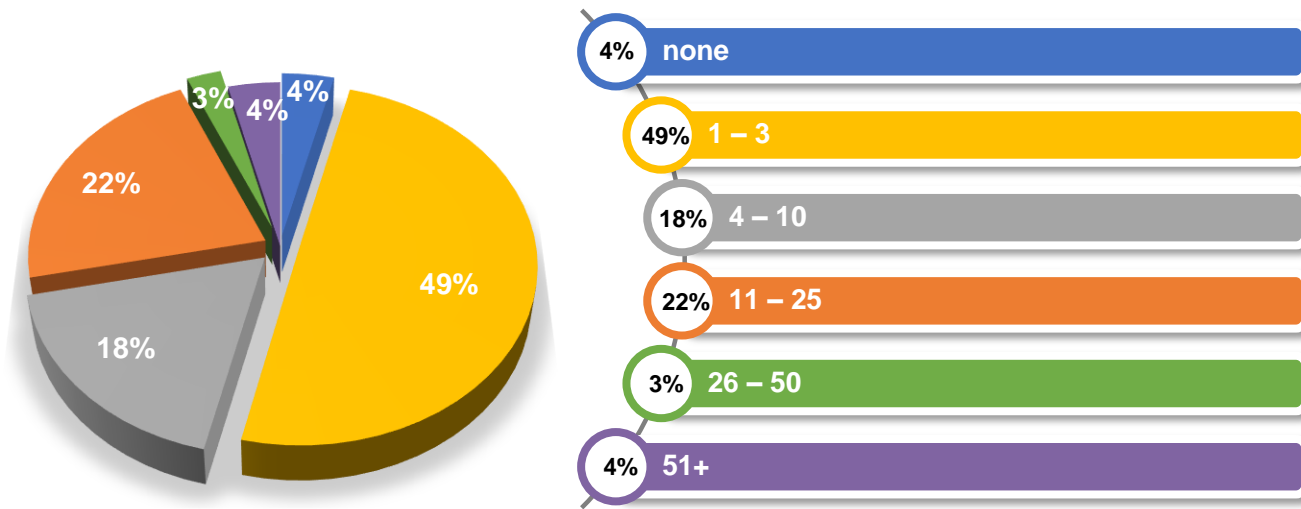
- Executive responsible for staffing function
- PSA Consultant
- Both Resource manager and Operations
- Technical Manager
- Combo of Resource Manager, Operations, and Workforce Planning

Q3: The largest inhibitors we have to effective resource management are due to (check all that apply) – PS/CS, MA, AATA



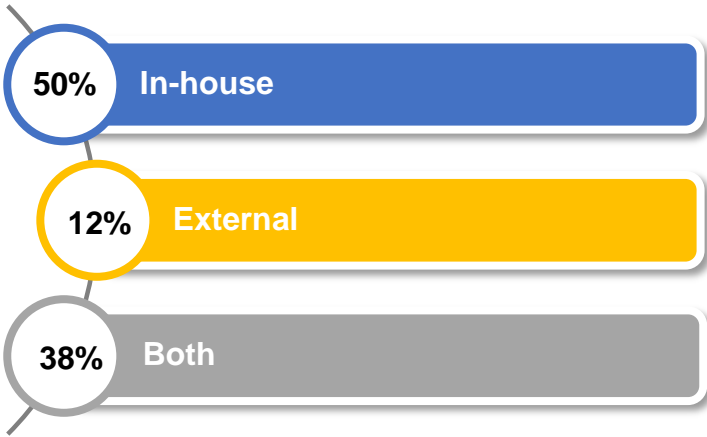
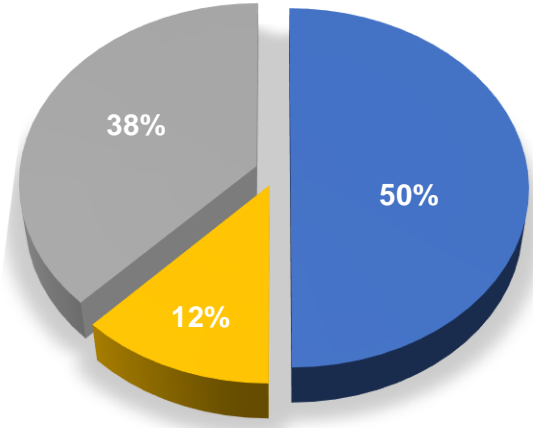
As need for more sophistication grows for RMOs, process issues lead the list of inhibitors to effective resource management. Although Technology issues are a close second, there has been a 14% decrease in those selecting it as an inhibitor, showing a sizeable improvement since 2020.

Q4: How many resource managers do you have across the enterprise? – PS/CS, MA, AATA



We had a good cross-section of different size organizations responding to the survey.

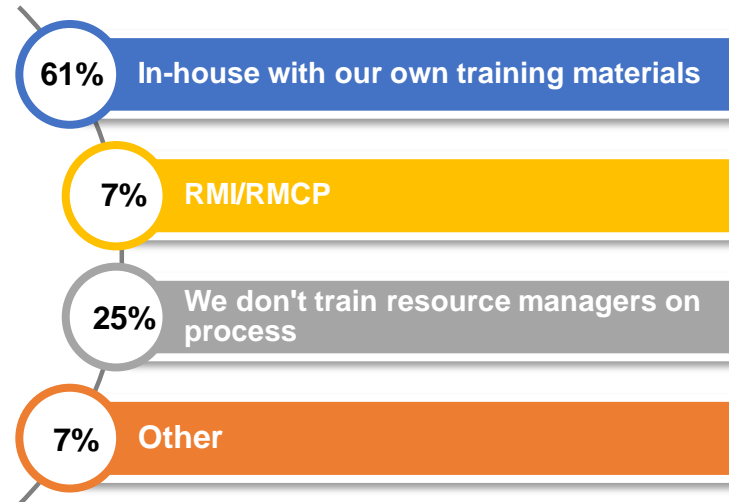
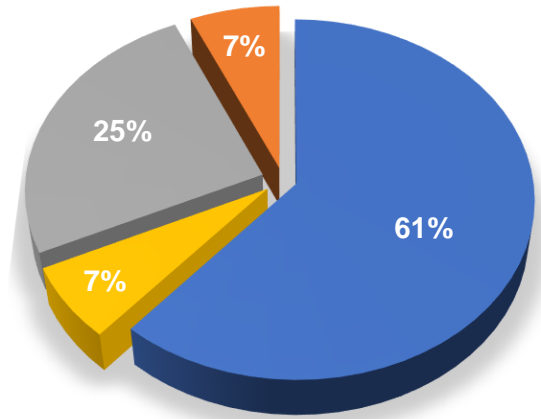
Q5: We source resource managers: – PS/CS, MA, AATA



Organizations are less likely to source RMs solely through in-house means compared to 2020. 50% of organizations now source, at least partially, through external sources, a 14% increase.

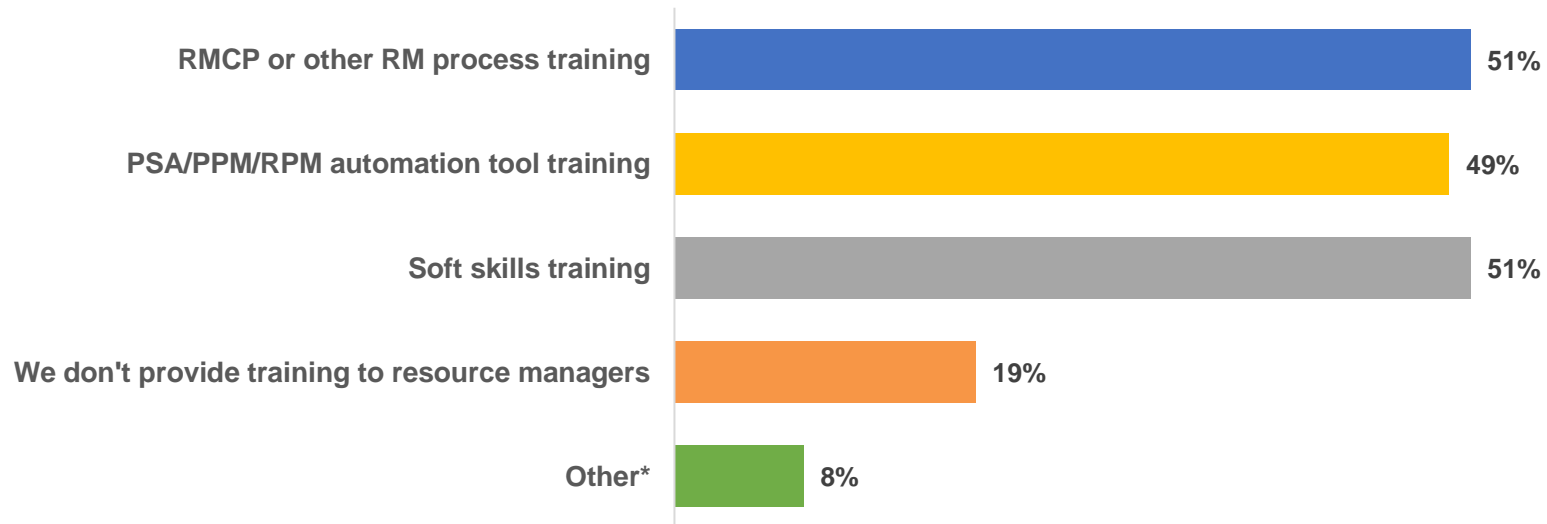
The RMI believes the gig marketplace and other non-traditional sources will continue to be a fast growing source of RM talent.

Q6: How is RM process training primarily provided for resource managers? – PS/CS, MA, AATA



Results are nearly identical to 2020. In-house training still leads the list, followed by industry standard process training from the RMI. One-fourth of organizations continue to not train resource managers on process.

Q7: What training is available to your resource managers? (check all that apply) – PS/CS, MA, AATA

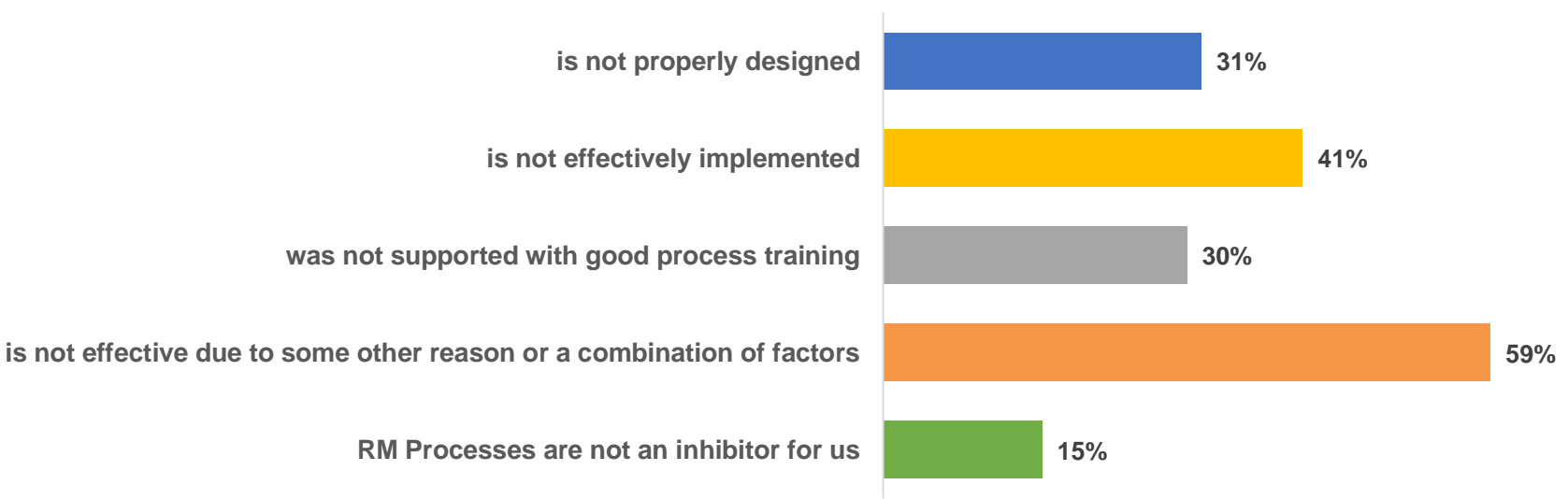


There is a good cross-section of training options available to resource managers. 19% stated that no training is provided to RMs.

Other:

- Shadowing
- Peer-to-Peer
- Our start up culture is a huge part of training
- On the job, Mentor led training
- Person-to-person knowledge transfer
- Part-time RM person is currently taking courses for PMP, to move into that field instead.

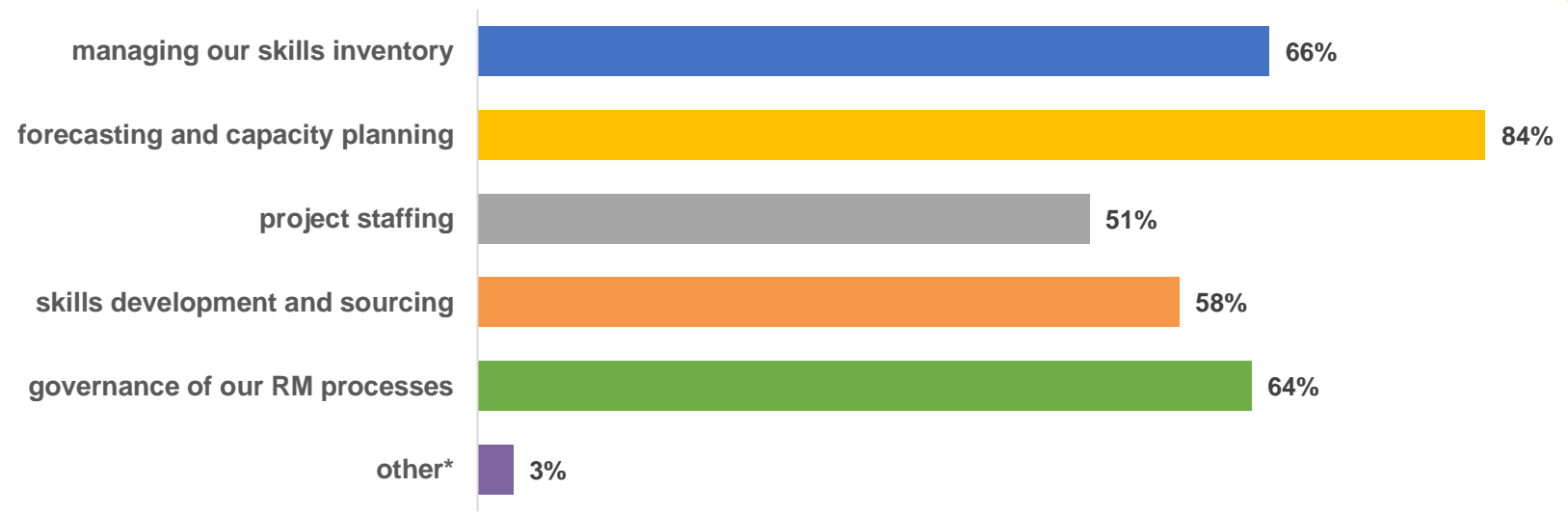
Q8: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply): – PS/CS, MA, AATA



Most firms continue to have issues with process design, implementation approach, training or some combination of these factors, while most of these process inhibitors are stable compared to 2020, process design has increased by 10%.

The RMI believes process design is getting more attention from RMOs as a result of maturing RMOs seeking more sophistication in their RM/WFM processes.

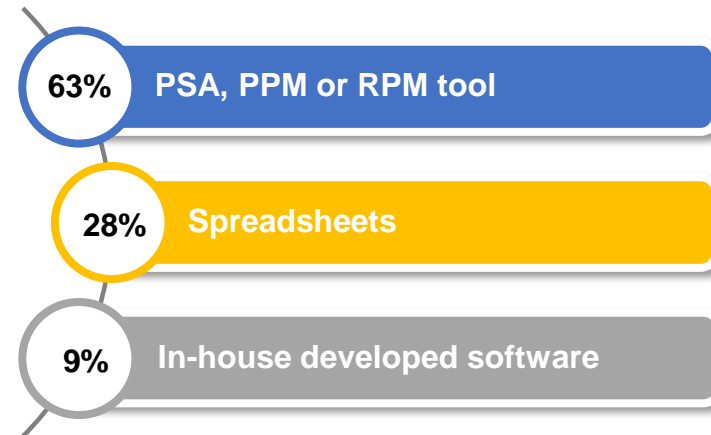
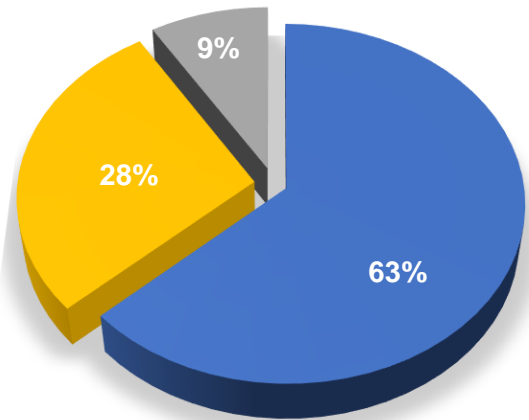
Q9: For future process improvements we need/plan to develop better processes for (check all that apply) – PS/CS, MA, AATA



Results were very similar to prior surveys. Forecasting and capacity planning, and developing a skills inventory continue to be areas requiring improvement. Without good forecasting supported by a well designed skills database, resource planning becomes a backwards looking and largely useless process. Poor design and execution in these areas continues to lead to frequent RM process failures amongst our membership. Governance also remains an important area for improvement.

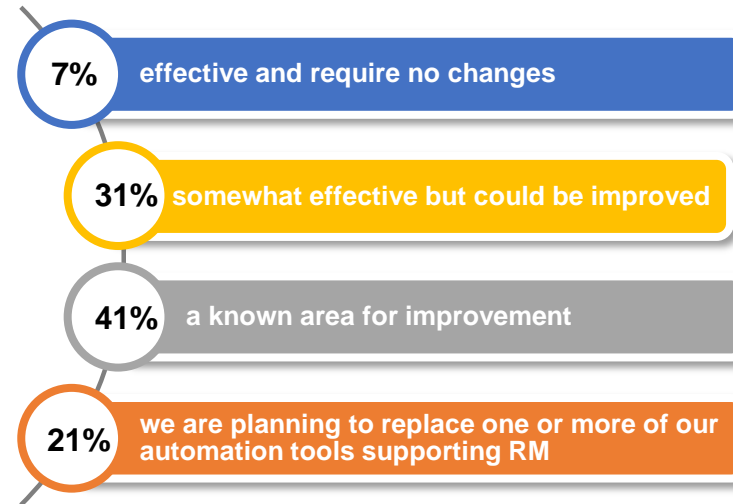
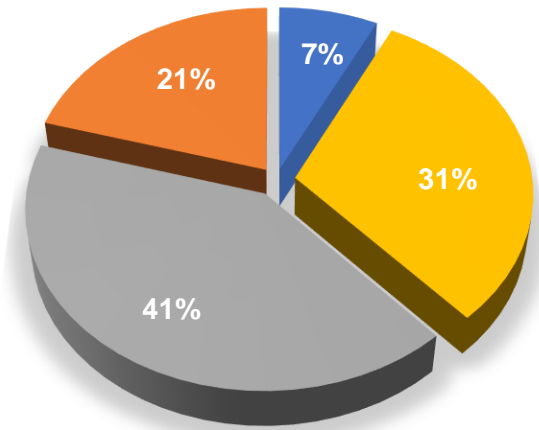
- Other:
- INTERLOCK MEETINGS! Having everyone involved in resource planning and utilization involved in bi weekly or some kind of regular meetings
 - Decision making authority

Q10: For automation of our resource management processes, we primarily use: – PS/CS, MA, AATA



As shown with a 9% drop since 2020, fewer organizations are relying on in-house developed tools for automation of RM processes. Nearly 2/3 of users are now using some commercially available PSA/PPM/RPM tool for automating their RM processes, up 5% compared to 2020. However, while commercial tools are getting better, there is still too much dependency on spreadsheets.

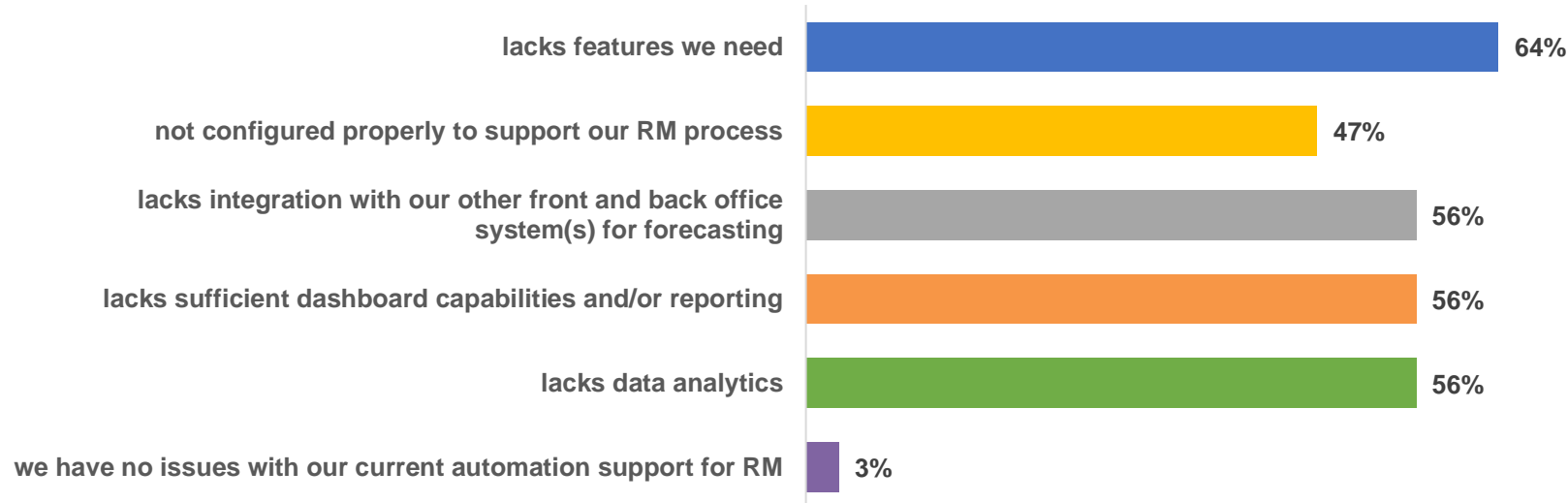
Q11: Regarding automation tool(s) support, our current tool(s) for RM support are – PS/CS, MA, AATA



There has been no major shift in sentiment regarding current tools.

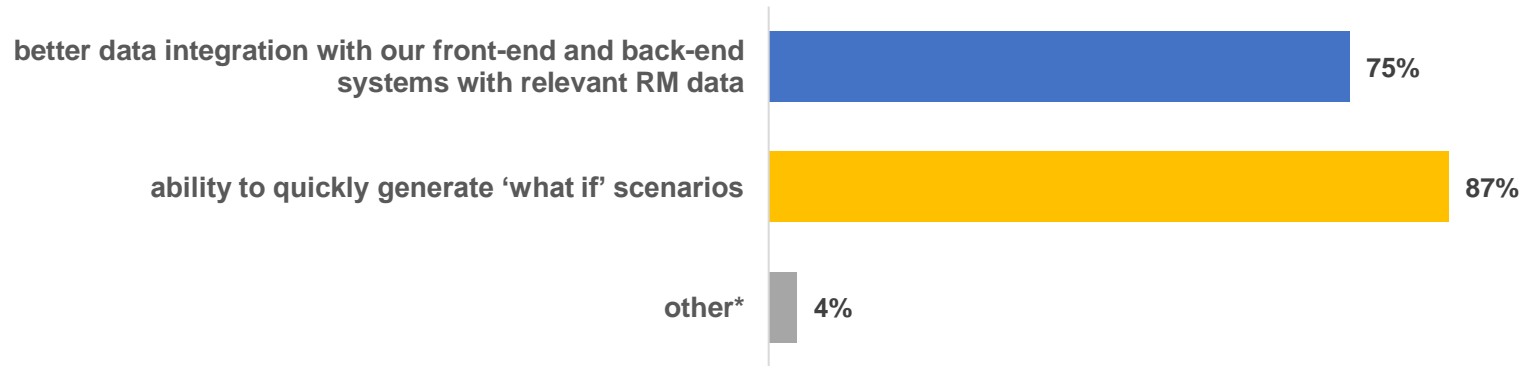
Most are either planning a replacement, or it is on the radar to address shortcomings. Although few feel their tools require no changes, there has been some improvement compared to 2020. The RMI has been tracking member success with automation solution optimization by better aligning process with technology via reconfiguration or process enhancements or both.

Q12: Current inhibitors in our automation support for RM include (check all that apply): – PS/CS, MA, AATA



Although improvements have been noticed, as 10% fewer have selected this as an inhibitor, lack of features tops the list for the third year. This is likely due to increasingly sophisticated RMOs putting more demands on their automation solutions.

Q13: If you listed data analytics as an inhibitor in previous question, what data analytics capabilities would you want (check all that apply): – PS/CS, MA, AATA

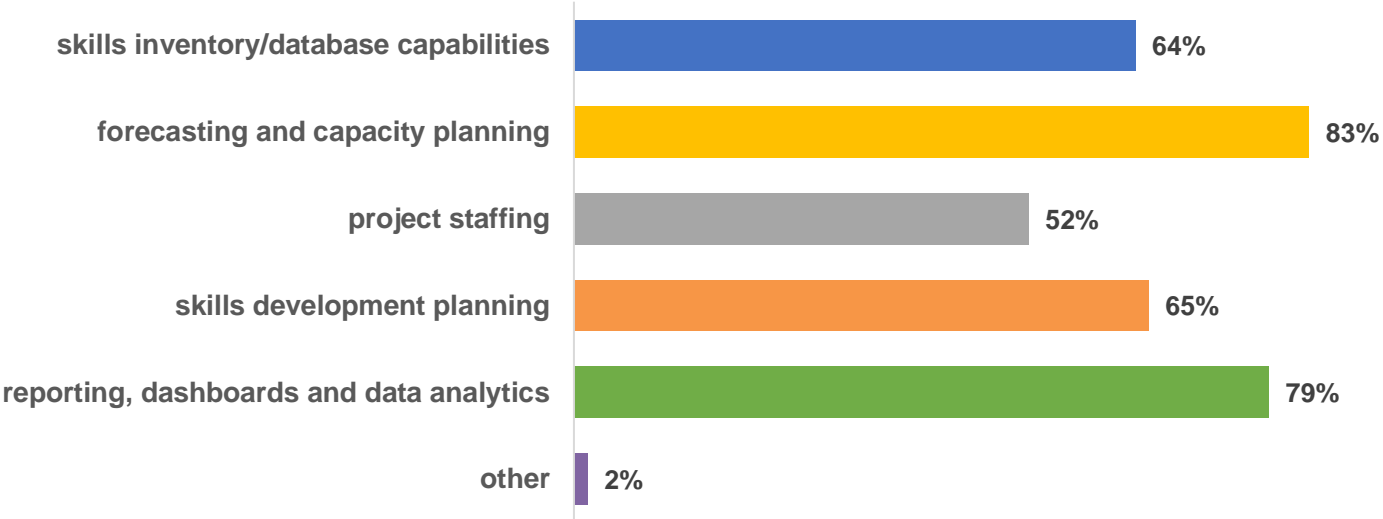


Similar to 2020, of those listing data analytics as an inhibitor with their current tool, most would like the ability to quickly generate 'what if' scenarios, along with better data integration.

Other:

- Better reporting and forecasting
- Ability to weight or prioritize resource needs

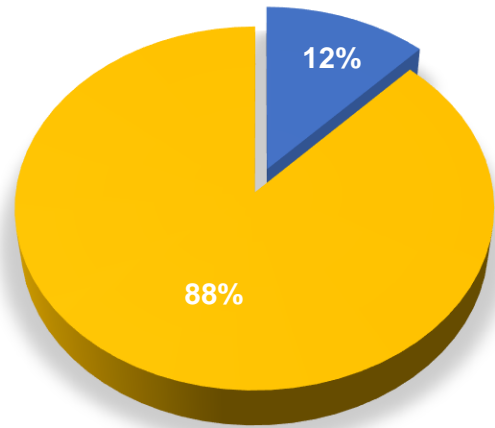
Q14: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply) – PS/CS, MA, AATA



There has been no major fluctuation in the top two responses. Better forecasting and useful data via analytics and dashboards remain big demand areas. However, skills development is gaining ground, up 13% since the last survey.

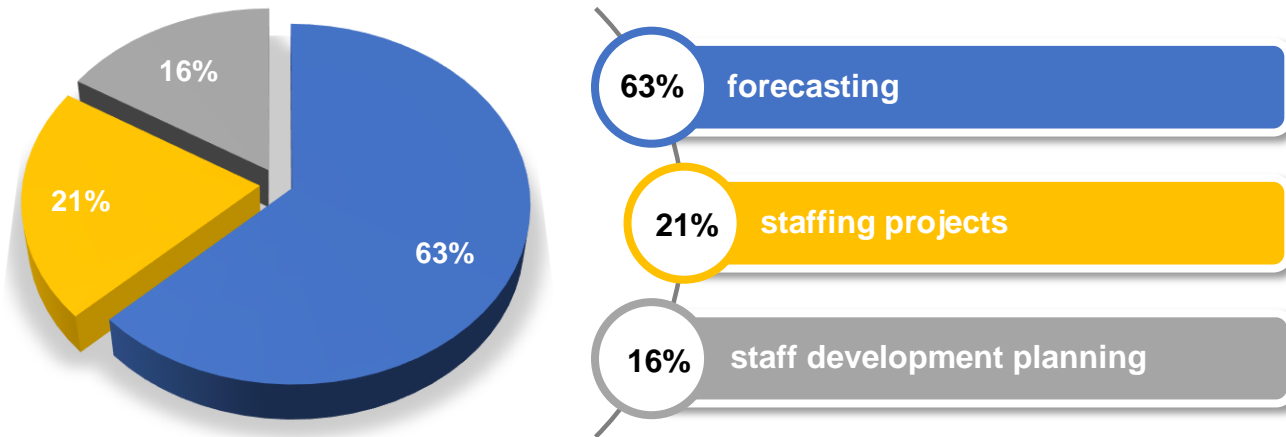
These are all part of any successful RM process, so it is expected that these areas are in demand as RM methods become more sophisticated and enterprise value of RM is more broadly embraced.

Q15: Are you using any kind of artificial intelligence features to support your resource management initiatives? – PS/CS, MA, AATA



This is the first year we have been able to trend the use of AI features in supporting RM initiatives, and results are nearly identical to 2020. 12% are reporting they are using AI for RM. We will continue to monitor this to see how AI accelerates RM outcomes in the future.

Q16: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority) – PS/CS, MA, AATA



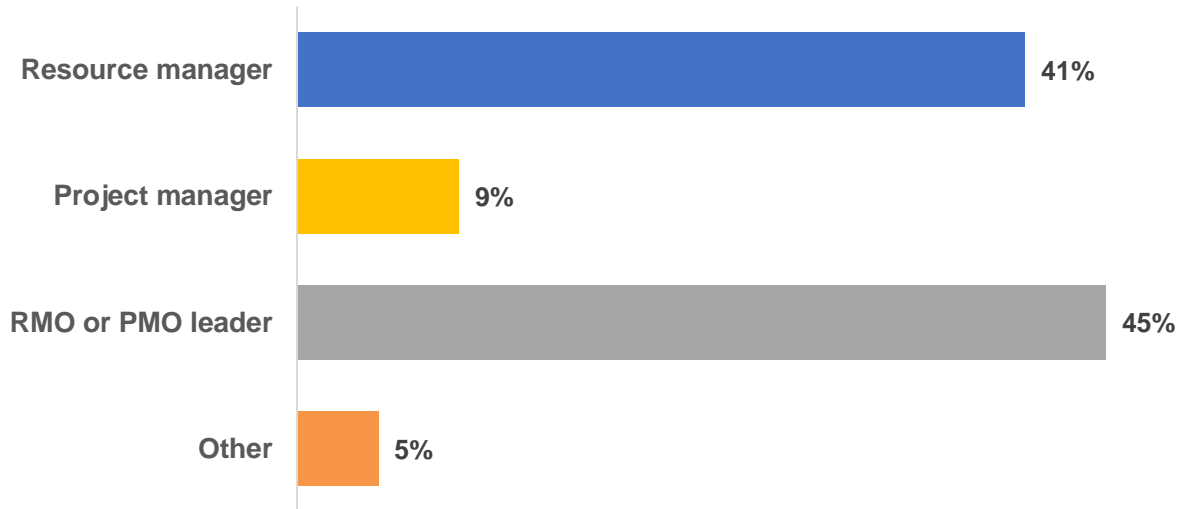
Although those using AI has not shifted much since 2020, there has been some change in how people think AI could be beneficial. Automated staffing saw a 3% increase in interest along with a 6% increase in staff development. Forecasting is down 9%. We think all three areas can greatly benefit from AI.

SERVICES TEAMS SERVING INTERNAL CLIENTS

Enterprise/IT (E/IT)
Product Development (PD)

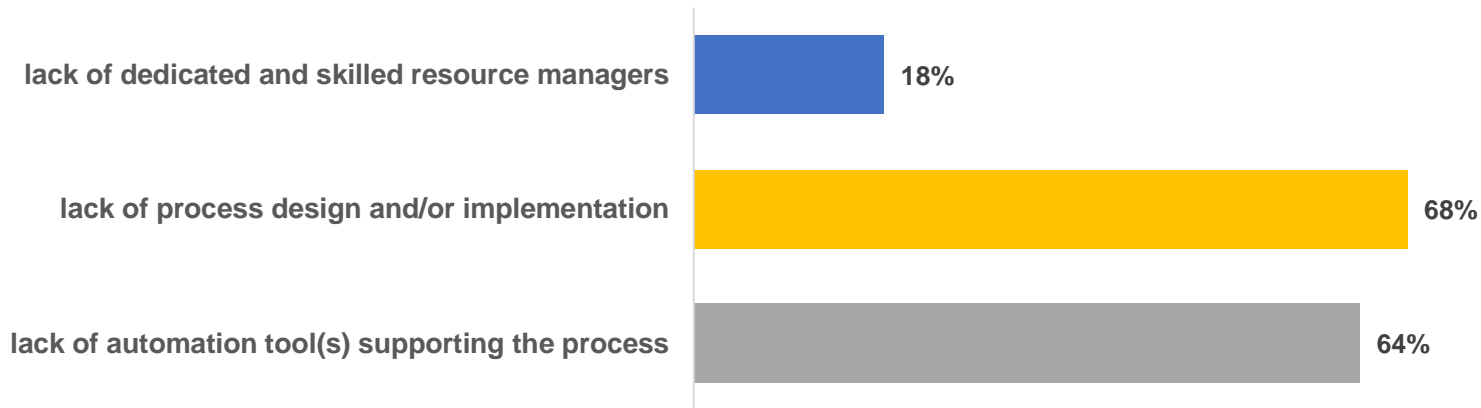


Q2: Which option best describes your role? – E/IT, PD



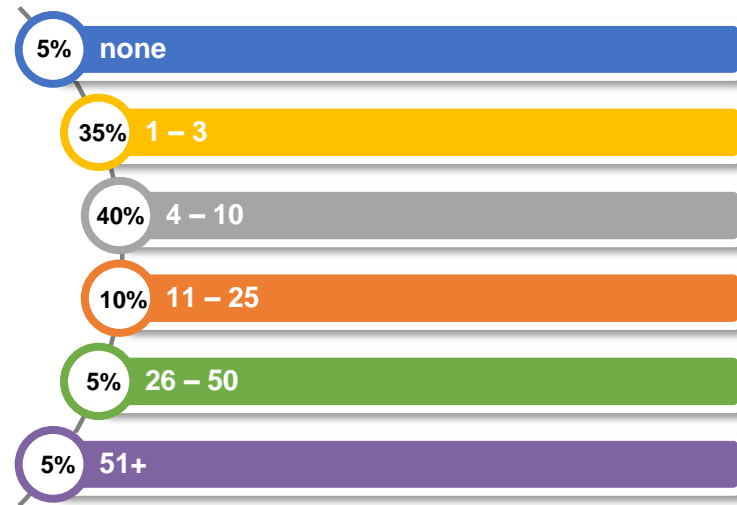
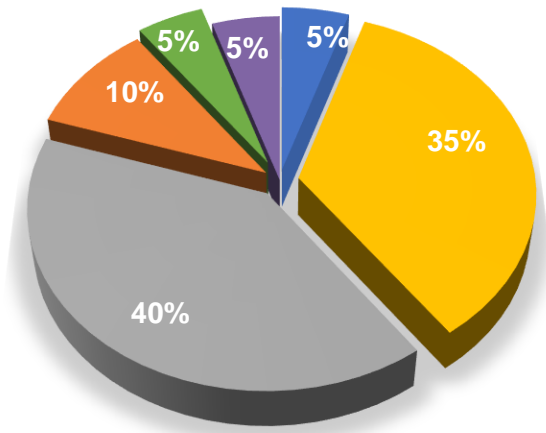
We had a good cross-section of respondents from various management and non-management roles.

Q3: The largest inhibitors we have to effective resource management are due to (check all that apply) – E/IT, PD



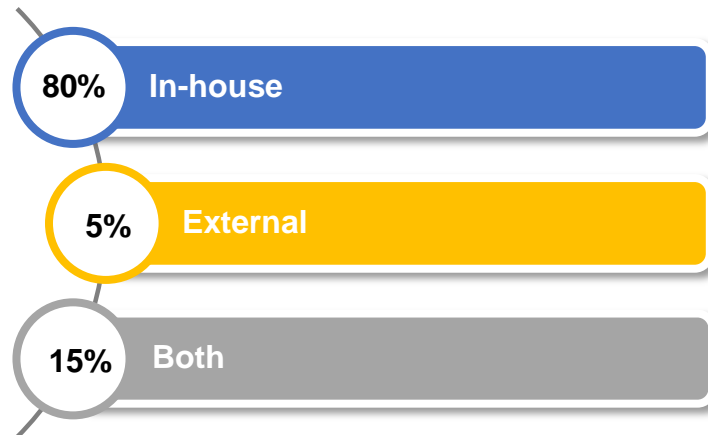
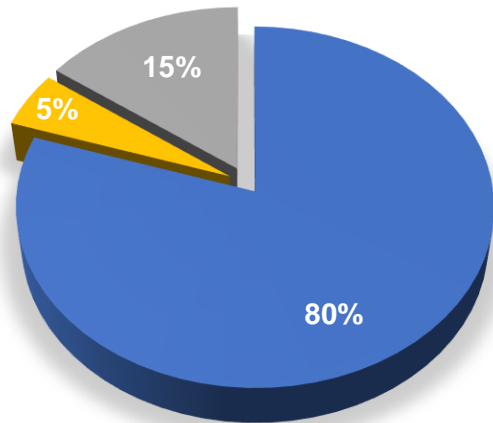
Process and automation technology grew 7% and 5.5% respectively as important inhibitors since we last surveyed this group. The shortage of skilled RM staff dropped dramatically where 18% indicate this is an inhibitor.

Q4: How many resource managers do you have across the enterprise? – E/IT, PD



We had a good cross-section of different size organizations responding to the survey.

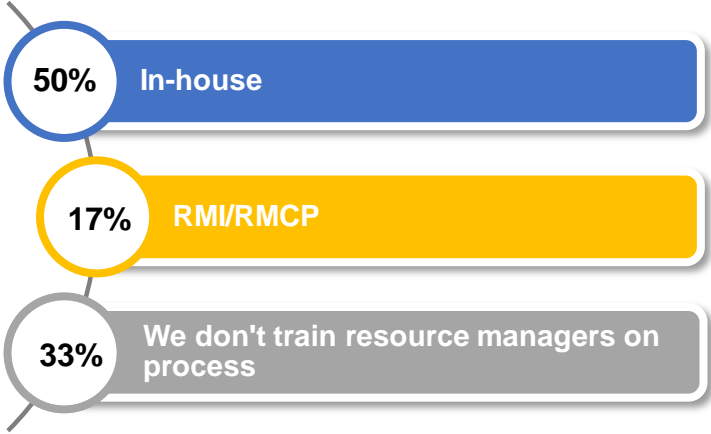
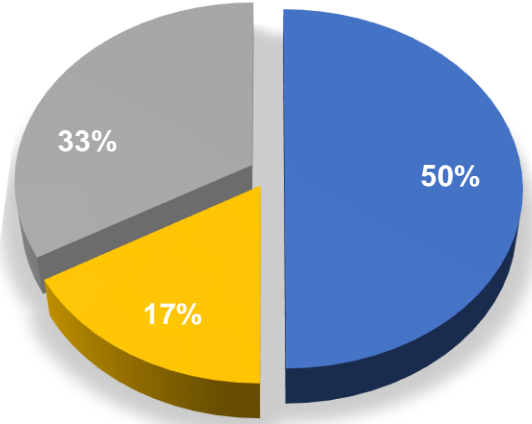
Q5: We source resource managers: – E/IT, PD



For those serving internal clients, sourcing RMs is overwhelmingly led by in-house sources. Skilled RMs are in short supply as the industry races to catch up with growing interest in better RM performance.

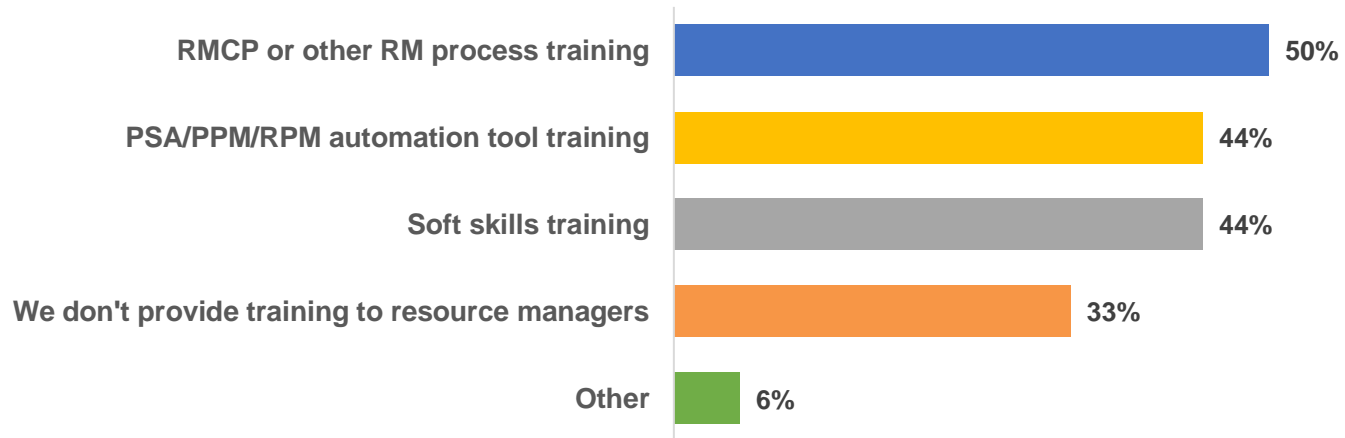
The RMI believes the gig marketplace and other non-traditional sources will be a fast growing source of RM talent.

Q6: How is RM process training primarily provided for resource managers? – E/IT, PD



In-house training continues to lead the list as the training method of choice. The RMI's RMCP® program held steady as a source of structured training for process excellence in RM, while a third of organizations continue to not offer any form of process training to RMs.

Q7: What training is available to your resource managers? (check all that apply) – E/IT, PD



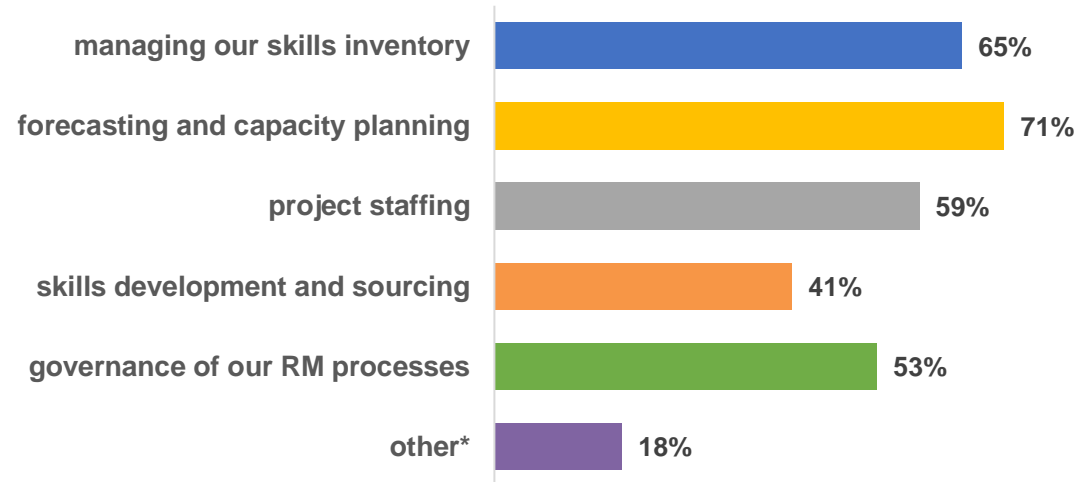
There is a good cross-section of training options available to most of the resource managers who participated in the survey; however, a third state that training is not provided to their RMs.

Q8: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply) – E/IT, PD



Firms reporting that their RM process is not an inhibitor continues to trend upward, growing by 5% to 22% vs. our 2020 survey. That bright spot was still overshadowed by the remainder having issues with implementation approach or a combination of other factors.

Q9: For future process improvements we need/plan to develop better processes for (check all that apply) – E/IT, PD

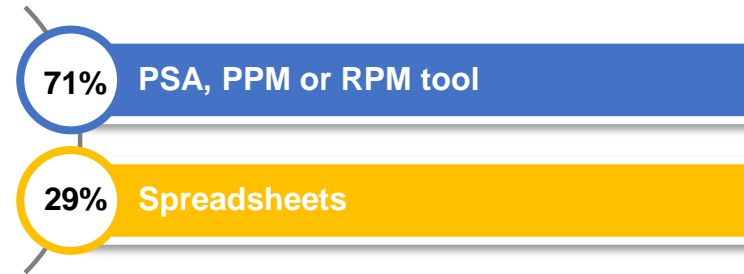
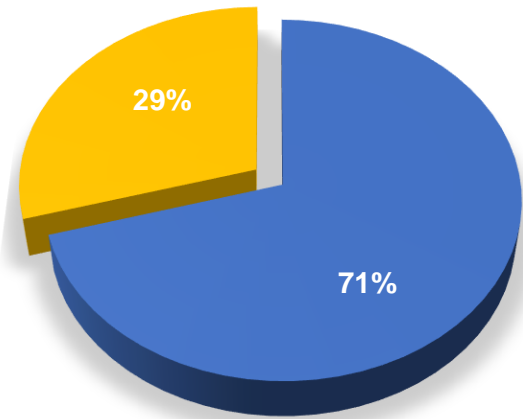


Forecasting and capacity planning jumped to the top of the list, growing nearly 16% to 71% compared to the 2020 survey. While maintaining a useful skills inventory dropped 10%, it remains a key area of focus, followed by project staffing and governance. RMI research is clear that a useful skills inventory combined with good forecasting are the two most essential elements needed to be effective at RM.

Other:

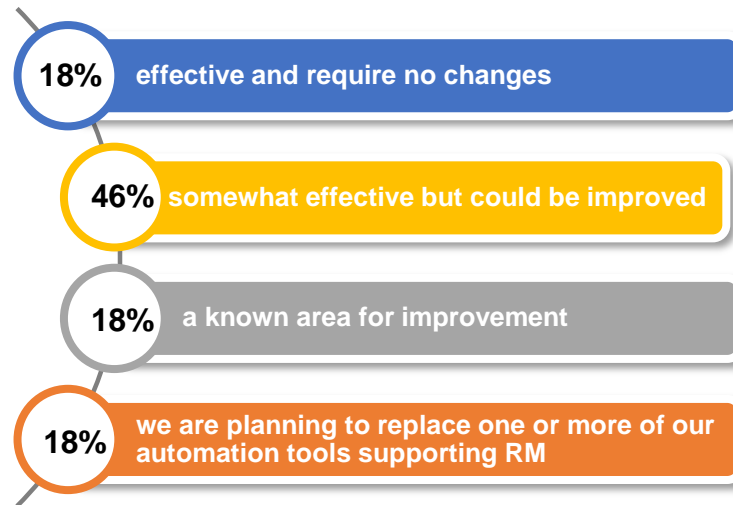
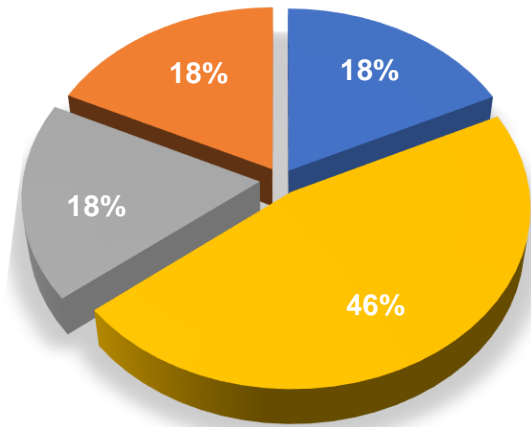
- Understanding effective RM to Staff ratios
- Leadership support for RM activities

Q10: For automation of our resource management processes, we primarily use: – E/IT, PD



Most are using some commercially available PSA/PPM/RPM tool for automating their RM processes, and this continues to trend upward for those serving internal clients. Although 29% are still reliant on spreadsheets, this number has fallen somewhat compared to the previous survey. While some still hang on to spreadsheets, commercial tools are getting better, and spreadsheet dependency is on the decline.

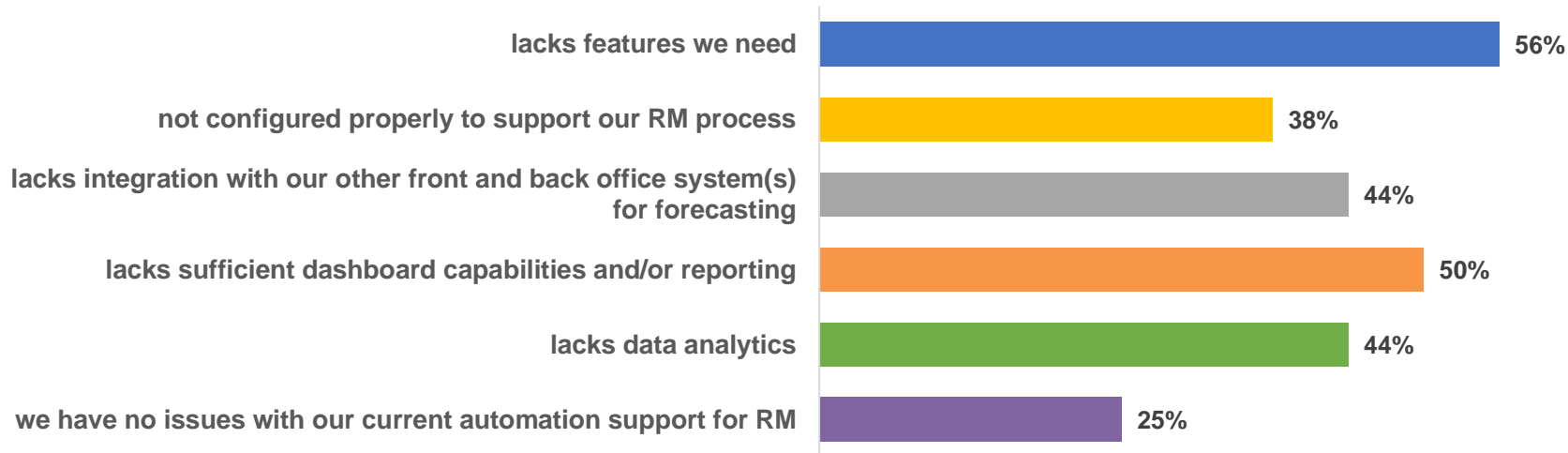
Q11: Regarding automation tool(s) support, our current tool(s) for RM support are – E/IT, PD



Those reporting effective to somewhat effective tools continues to trend upward, with a 10% gain since the last survey; however, those planning a total system replacement remains steady at 18%.

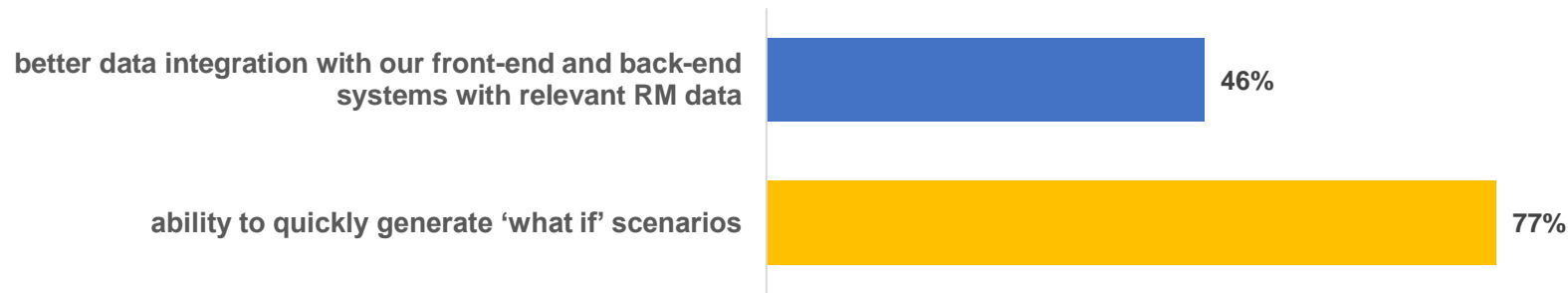
The RMI has been tracking member success with automation solution optimization by better aligning process with technology via reconfiguration or process enhancements or both.

Q12: Current inhibitors in our automation support for RM include (check all that apply): – E/IT, PD



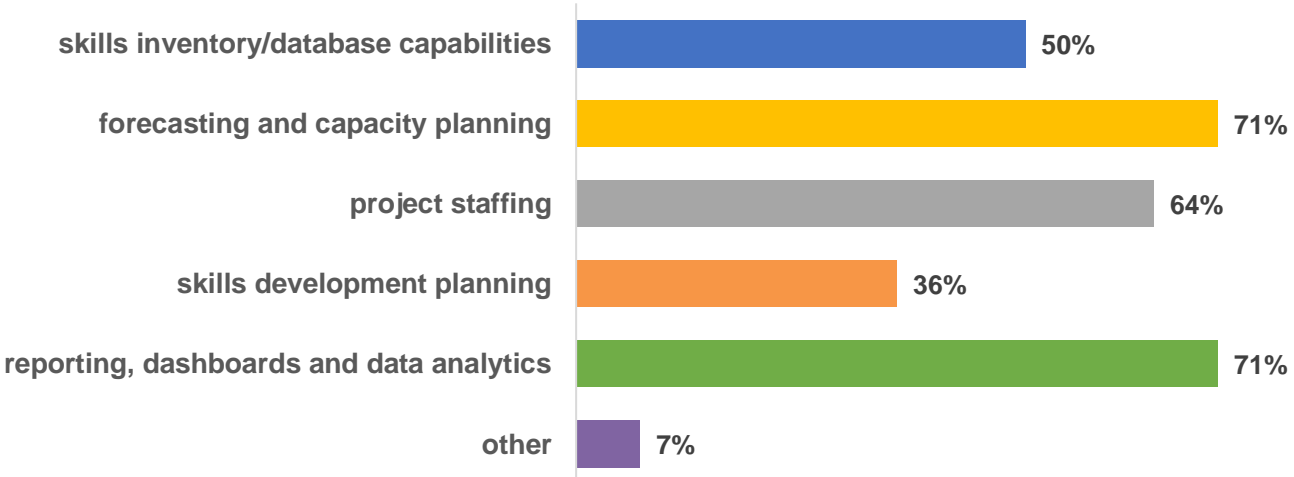
The lack of features and insufficient dashboarding capabilities continue to top the list of inhibitors in automation support. On a positive note, those indicating that they have no issues with the current automation support is moving in an upward direction. A quarter of responses indicate they have no issues.

Q13: If you listed data analytics as an inhibitor in previous question, what data analytics capabilities would you want (check all that apply) – E/IT, PD



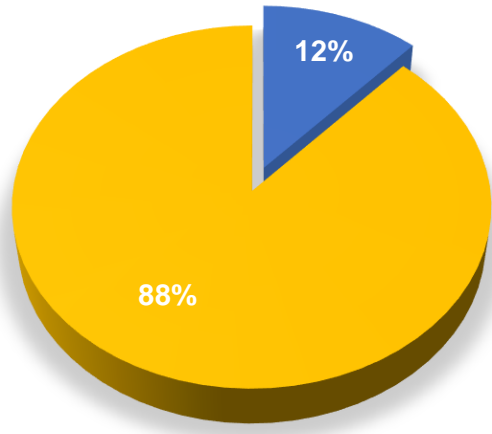
When compared to previous surveys, the ability to generate 'what if' scenarios remains most important to E/IT and PD organizations. Data integration remains an interest, but has dropped 16% since 2020. Our insights on the PSA/PPM/RPM vendors is that they are aware and focused on these needs.

Q14: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply) – E/IT, PD



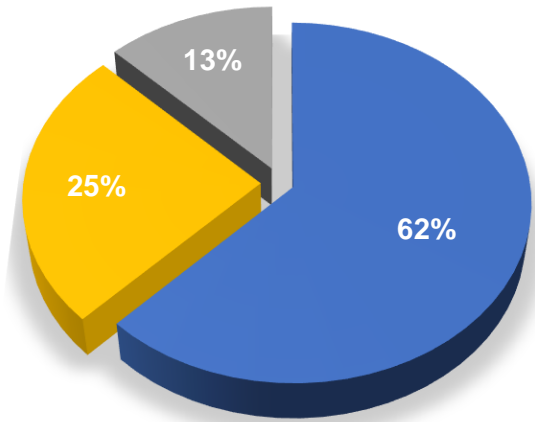
Better forecasting and data analytics are the highest demand areas for future automation support. Project staffing is an area of growing interest as well with a 30% increase in those stating they plan to address this issue compared to 2020. Useful data via analytics and dashboards are clearly growing in demand as RM methods become more sophisticated and enterprise value of RM is more broadly embraced.

Q15: Are you using any kind of artificial intelligence features to support your resource management initiatives? – E/IT, PD



With one year of trend data, we see that AI has many potential future possibilities. With 12% of those serving internal clients reporting they use AI for RM compared to a combined score of only 4% in 2020; however, this growth is stemming solely from the E/IT domain. We are excited to see how AI accelerates RM outcomes in the future as more adopt this technology.

Q16: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority) – E/IT, PD



Results are very much inline with what was reported in 2020, which isn't a surprise since so many organizations struggle with forecasting. While using AI for staffing was cited less, it is trending slightly upward, and we think this is an area that will see much more focus in the future.

Survey Summary



Survey Summary

- 1 Overall process and automation technology for RM/WFM continue to be opportunity areas for RMOs, while finding and growing talent for larger and more sophisticated RM environments are challenging in what is currently a tight labor market with a clear shortage of experienced resource managers (as reported in our last research report on profession of the RM/RMO leader).
- 2 Process design is getting more focus as the typical RMO matures RM/WFM processes in search of greater sophistication and capability. The RMI will continue to play an important role in industry process standardization with Just-in-Time Resourcing® and supporting training to aid the overall industry acceleration of progress in RM, providing a sound foundation for accelerating the improvement of RM/WFM outcomes.
- 3 Data strategies and capture will continue to be a critical lynchpin for acceleration of progress with the RM/WFM discipline as reflected in this report indicating demand for better dashboards, additional analytics, improved data integration, and potential applications for artificial intelligence (AI).



KANTATATM

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