




# Resource Management Governance

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# AGENDA

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

# Survey Background

- 1 This was the first survey on Resource Management Governance Processes. This survey was conducted in 3Q/2023 and included seven different project-based domains.
- 2 Governance of any enterprise-wide process is important and challenging. There is no exception to this when it comes to managing today's RMO. This survey was conducted to identify what companies are measuring, who is using the data, how the data is managed, who is involved in the governance process, cadence for governance processes and more.
- 3 Input was provided by RMO leaders, resource managers, PMO leaders, operations managers, delivery managers, and services/business unit executives from 56 different companies across Professional/Consulting Services; Enterprise/IT; Product Development; Marketing Agencies; Accounting, Audit, Tax, and Advisory; Law Firms; and Engineering.
- 4 For analysis purposes, responses to this survey were organized into two segments: companies that serve external customers (Professional/Consulting Services; Marketing Agencies; Accounting, Audit, Tax, and Advisory; and Law Firms) and those that serve internal customers (Enterprise/IT Services, Product Development, and Engineering).



# Survey Questions

## 01 What type of organization do you represent?

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

## 02 Which option best describes your role?

- |                     |               |                    |          |
|---------------------|---------------|--------------------|----------|
| a) Resource Manager | c) RMO Leader | e) Delivery Leader | g) HR    |
| b) Project Manager  | d) PMO Leader | f) Operations      | h) Other |

## 03 How many resources in total does your organization manage collectively with all resource managers?

- |          |            |            |
|----------|------------|------------|
| a) <50   | c) 100-199 | e) 500-999 |
| b) 50-99 | d) 200-499 | f) 1000+   |

## 04 What is the biggest inhibitor to RM governance in your organization? Lack of...

- |                             |                                                       |                                    |          |
|-----------------------------|-------------------------------------------------------|------------------------------------|----------|
| a) defined processes        | d) Controls in place to monitor RM data and processes | e) KPIs for RM                     | g) Other |
| b) the right data available |                                                       | f) adequate reporting capabilities |          |
| c) quality/accurate data    |                                                       |                                    |          |

## 05 What role is responsible for RM process governance (ensuring data is accurate, processes are followed, driving continuous improvement to RM processes, etc.) in your organization?

- |                     |                        |          |
|---------------------|------------------------|----------|
| a) Resource Manager | c) Delivery Leadership | e) Other |
| b) Operations       | d) RMO Leader          |          |

## 06 Does your organization have a documented Charter for your RMO/resource management function?

- a) Yes      b) No

## 07 Does your organization have RM processes documented and training available?

- a) Yes      b) No

## 08 How is resource data stored and managed within your organization? Data is stored...

- a) in multiple systems among teams/departments/practices that use different processes to provide the data  
b) in multiple systems among teams/departments/practices with some sharing of common processes to provide the data  
c) centrally among teams/departments/practices utilizing the same processes to provide the data  
d) centrally among teams/departments/practices utilizing different processes to provide the data

## 09 Does your organization have resource supply and demand data to support decision-making, reporting, and analytics?

- |                                             |                                                   |          |
|---------------------------------------------|---------------------------------------------------|----------|
| a) Yes, we have good supply and demand data | c) We are working to get supply and demand data   | e) Other |
| b) We have some supply and demand data      | d) No, we don't have supply and demand data today |          |

## 10 Sources of RM data to support decision-making in your organization are:

- |                                                 |                                                                        |
|-------------------------------------------------|------------------------------------------------------------------------|
| a) Reliable - no changes needed                 | d) Not reliable                                                        |
| b) Somewhat reliable - some improvements needed | e) We are working on process design changes to address this deficiency |
| c) Reliability varies by input source           |                                                                        |

## 11 How often is resource supply and demand data updated to support decision-making, reporting, and analytics?

- |              |            |          |
|--------------|------------|----------|
| a) Real-time | c) Weekly  | e) Never |
| b) Daily     | d) Monthly |          |

## 12 What categories do you use for defining RM performance metrics? (Select all that apply)

- a) Staffing efficiency      b) Compliance      c) Accuracy      d) Productivity

## 13 How satisfied are you with your PSA/PPM/RPM tool(s) regarding capabilities for enabling and controlling RM data and processes?

- |                   |                                       |                      |
|-------------------|---------------------------------------|----------------------|
| a) Very satisfied | c) Neither satisfied nor dissatisfied | d) Dissatisfied      |
| b) Satisfied      |                                       | e) Very dissatisfied |

## 14 Who is responsible for driving PSA/PPM technology adoption in your organization?

- |        |                    |                        |
|--------|--------------------|------------------------|
| a) IT  | c) Operations      | e) Resource Management |
| b) PMO | d) Deliver Leaders | f) Other               |

## 15 Does your organization have controls in place to monitor adherence of RM processes?

- a) Yes      b) No



# Key Takeaways

- 1 Effective Resource Management is highly dependent on a centralized capability that oversees the infrastructure and processes to manage the inputs and outputs related to all RM functions. As evidenced in this research report, overall industry focus on RM governance needs to rise.
- 2 The biggest inhibitor to RM governance is the lack of well-defined processes that in turn help support quality data for decision making purposes. A fundamental starting point is to focus on developing a well-defined charter for the RMO.
- 3 Data quality is an ever-present concern. Decision-making depends on sound data. More energy needs to be spent focusing on data hygiene and coalescing potentially disparate systems and processes around a core subset of data needed by Resource Management. The mantra of capture, perfect and automate is central to advancing the data we use and how our PSA/PPM systems use it to help with decision-making.
- 4 While survey respondents overwhelmingly shared that RM owns RM Governance, there is room to move the needle more on the RMO charter and process development, as well as inserting the proper controls to monitor process adherence.

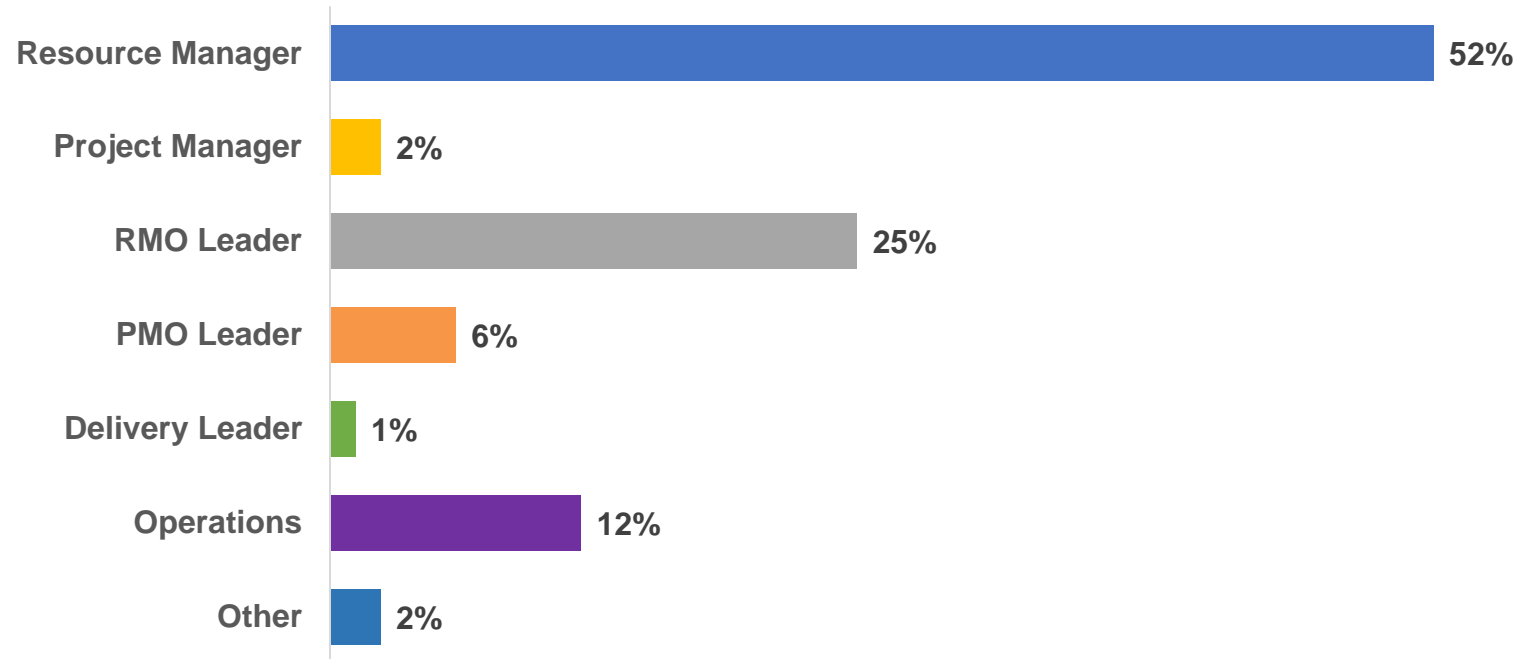




## SERVICES TEAMS SERVING EXTERNAL CLIENTS

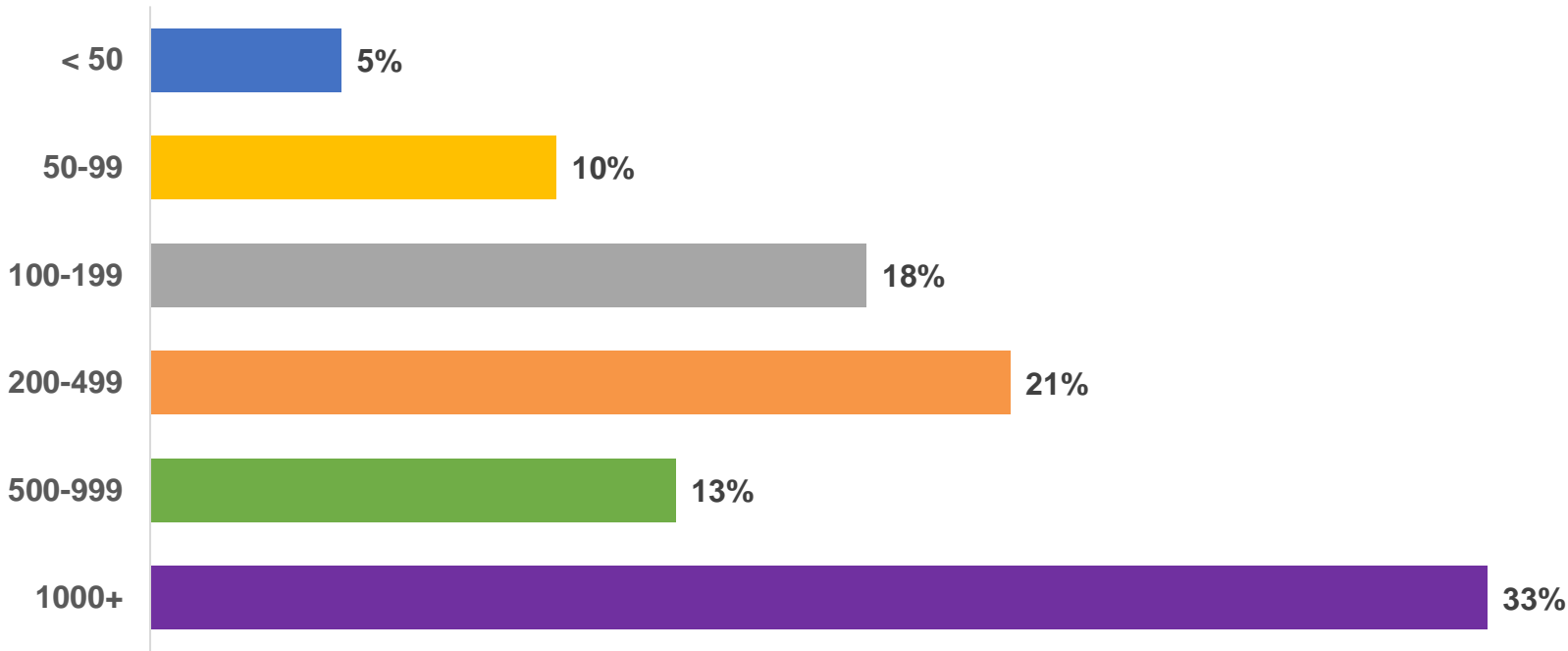
Professional/Consulting Services (PS/CS)  
Marketing Agencies (MA)  
Accounting/Audit/Tax/Advisory (AATA)  
Law Firms (LF)

## Q2. Which option best describes your role?



Survey respondents were predominantly those directly involved with leading or operating the RMO.

# Q3. How many resources in total does your organization manage collectively with all resource managers?

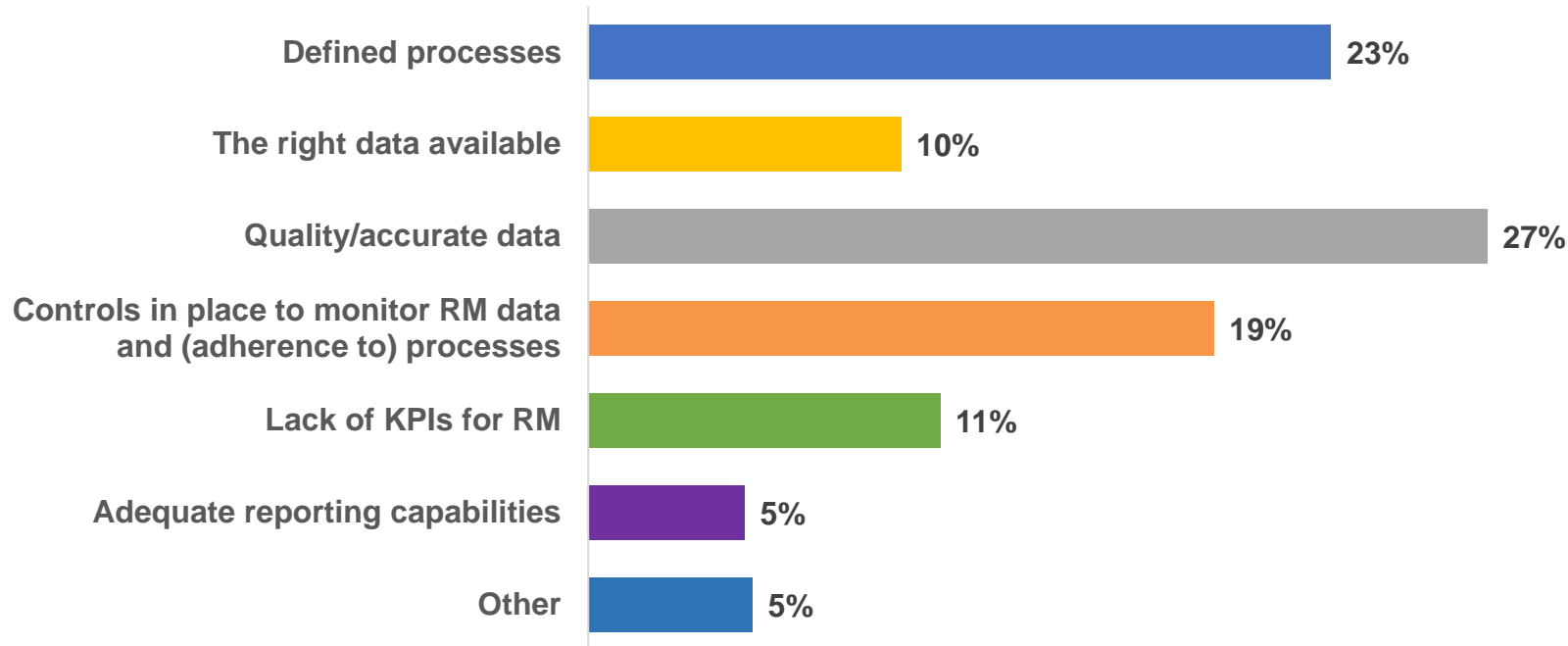


This survey had a good cross section of respondents from many different sized companies with more than two-thirds from organizations that manage 200 or more resources.



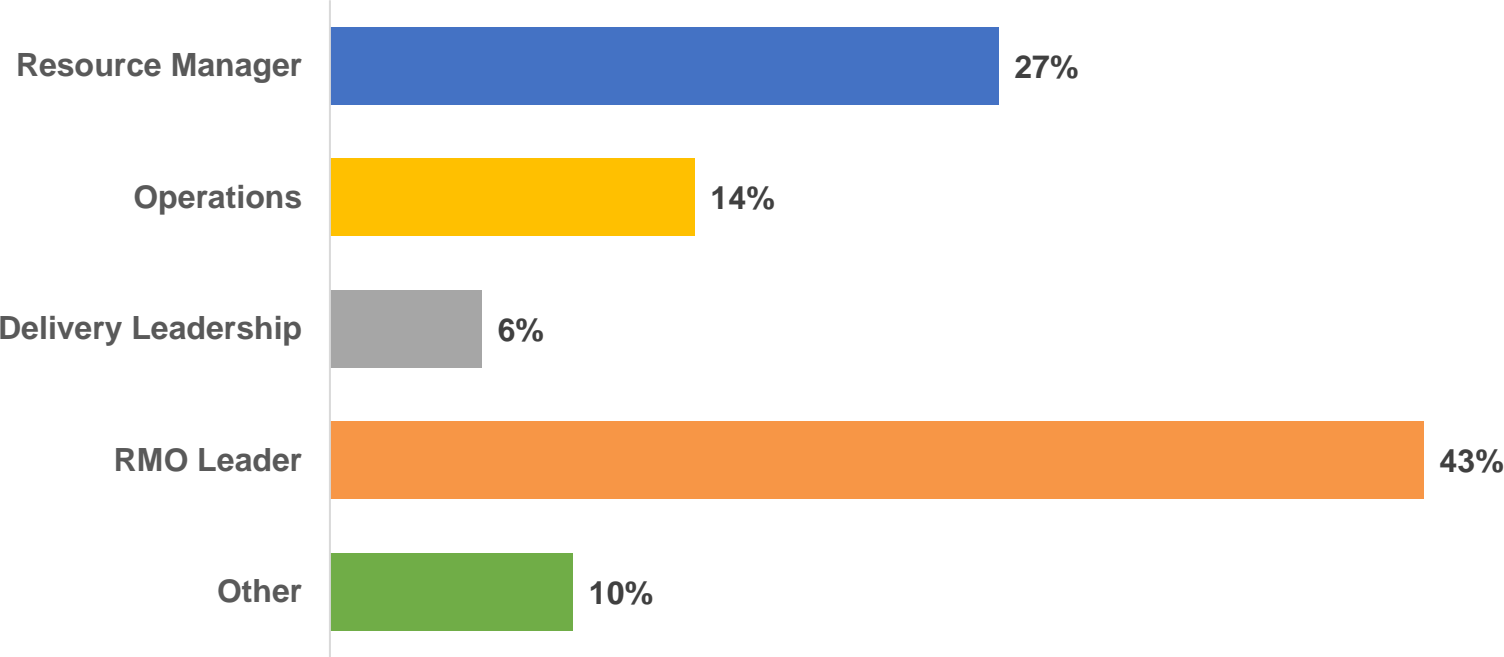
## Q4. What is the biggest inhibitor to RM governance in your organization?

**Our biggest inhibitor to RM governance is a lack of:**



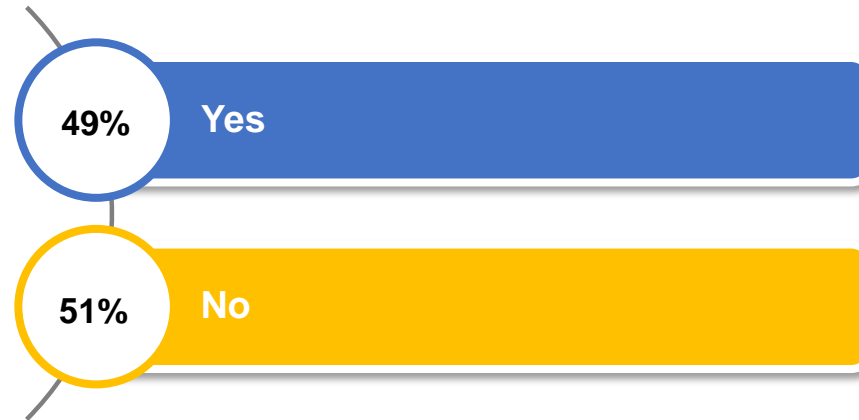
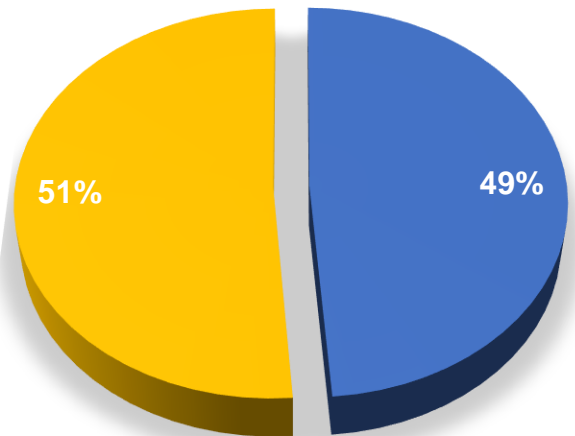
When it comes to RM governance, organizations serving external customers believe that the biggest inhibitors are the lack of quality/accurate data and the lack of defined processes.

Q5. What role is responsible for RM process governance (ensuring data is accurate, processes are followed, driving continuous improvement to RM processes, etc.) in your organization?



As expected, the responsibility of ensuring RM process governance most often falls to the RMO, either at the leadership or RM level. This connects with responses from the 2023 RMO Organizations survey that aligns process/governance with the RMO.

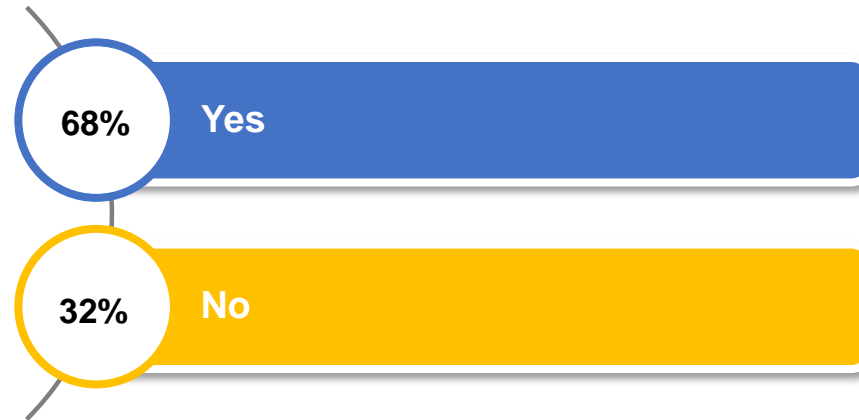
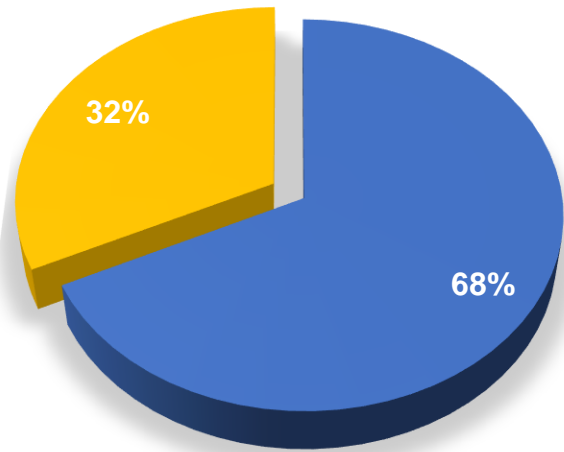
## Q6. Does your organization have a documented Charter for your RMO/Resource Management function?



Having a documented RMO charter is an RMI recommended best practice. Responses are almost evenly divided between those who do and do not have a documented charter. This is an area for focused improvement.



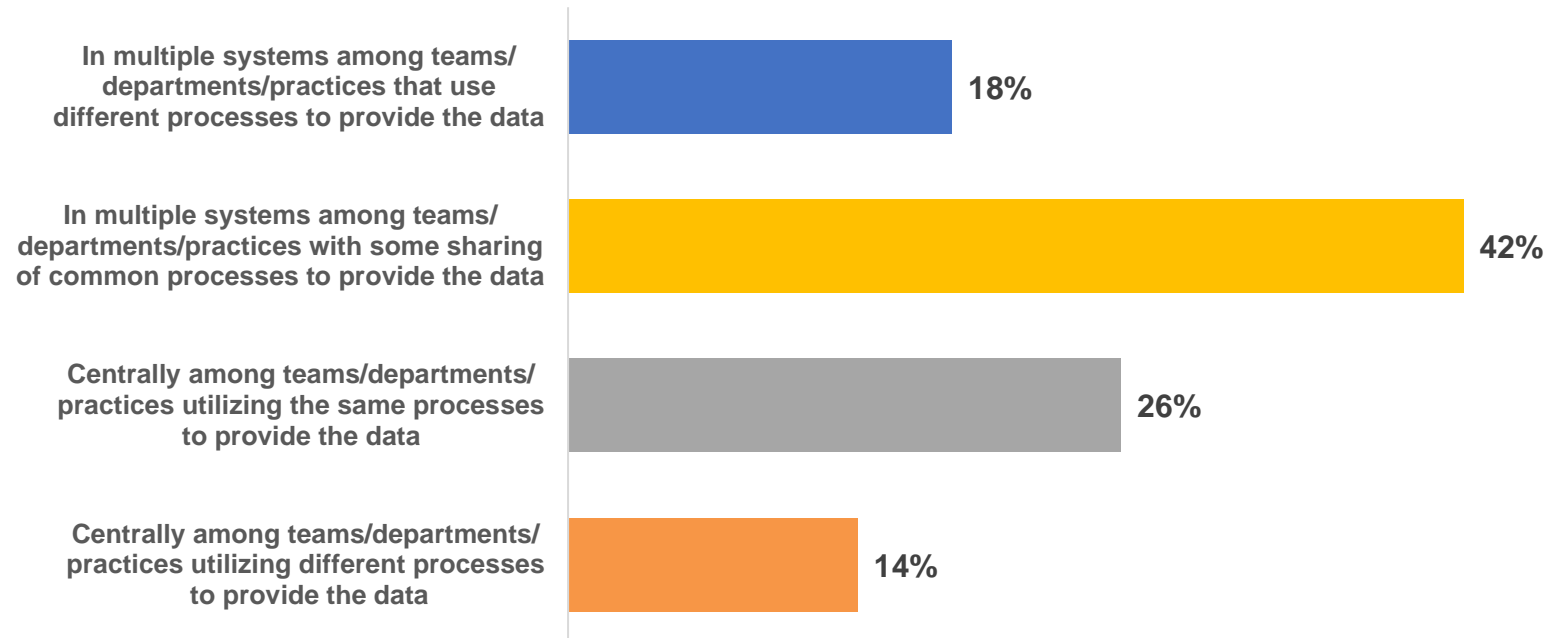
## Q7. Does your organization have RM processes documented and training available?



More than two-thirds of respondents from client-facing organizations have documented RM processes and training available, which is an RMI recommended practice.

## Q8. How is resource data stored and managed within your organization?

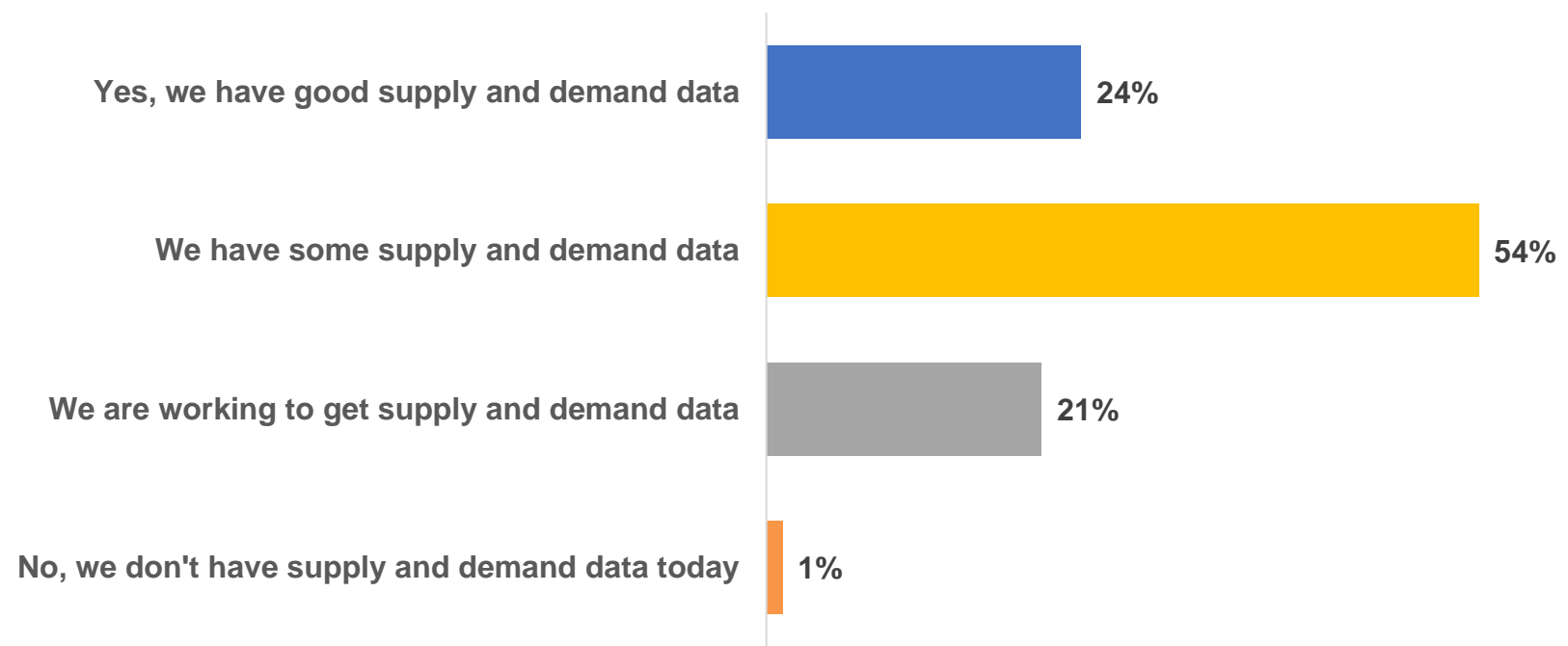
### Resource data is stored and managed:



The top two inhibitors for RM Governance in this survey were (#1) quality/accurate data and (#2) lack of defined processes. Poor data quality is often the result of poor process. As evidenced here, 42% of organizations are working across multiple systems and sharing some common processes to support it.

The RMI sees an opportunity to streamline/consolidate systems across teams and focus on improvements where processes interconnect among disparate systems to help establish sound data storage and hygiene.

# Q9. Does your organization have resource supply and demand data to support decision-making, reporting, and analytics?

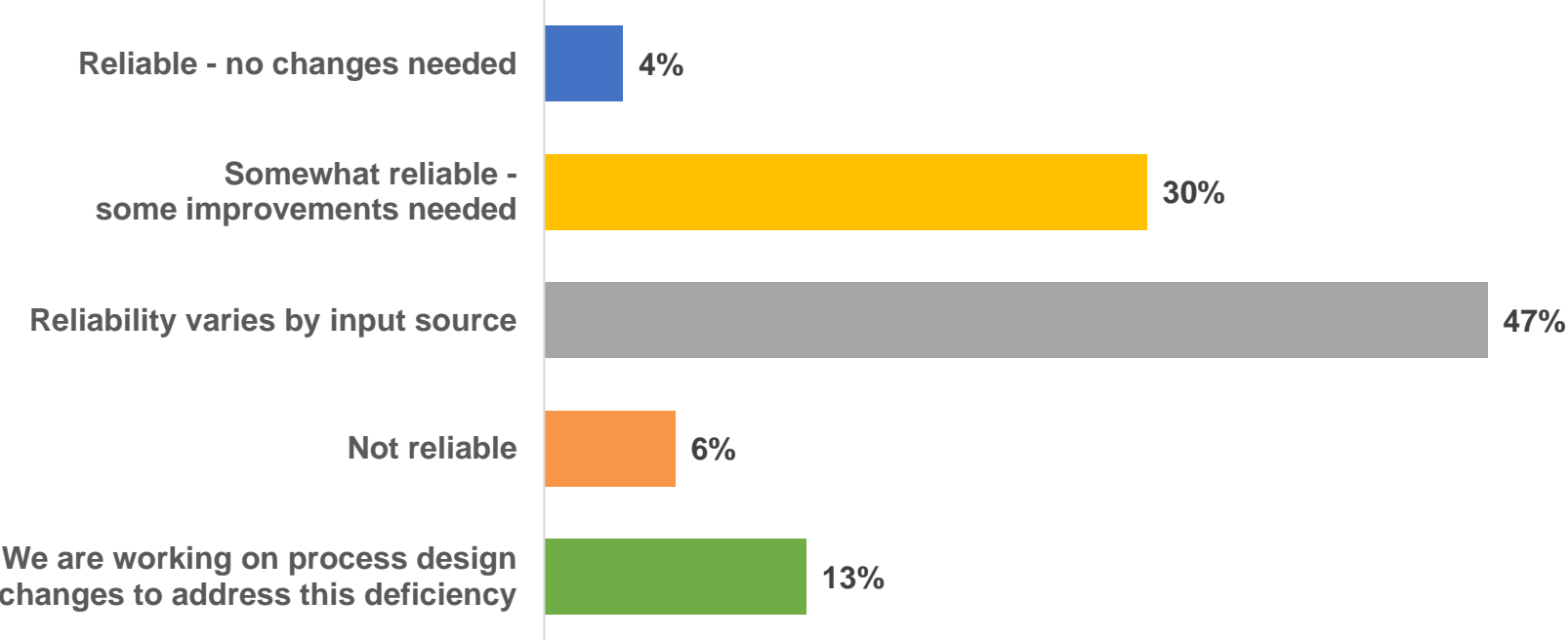


An encouraging sign is that the majority of organizations (78%) have at least some supply and demand data to support decision making and reporting efforts.

Having proper RM governance instituted is paramount to ensure the data is normalized in terms of supply and demand decomposition per RMI recommended practices.



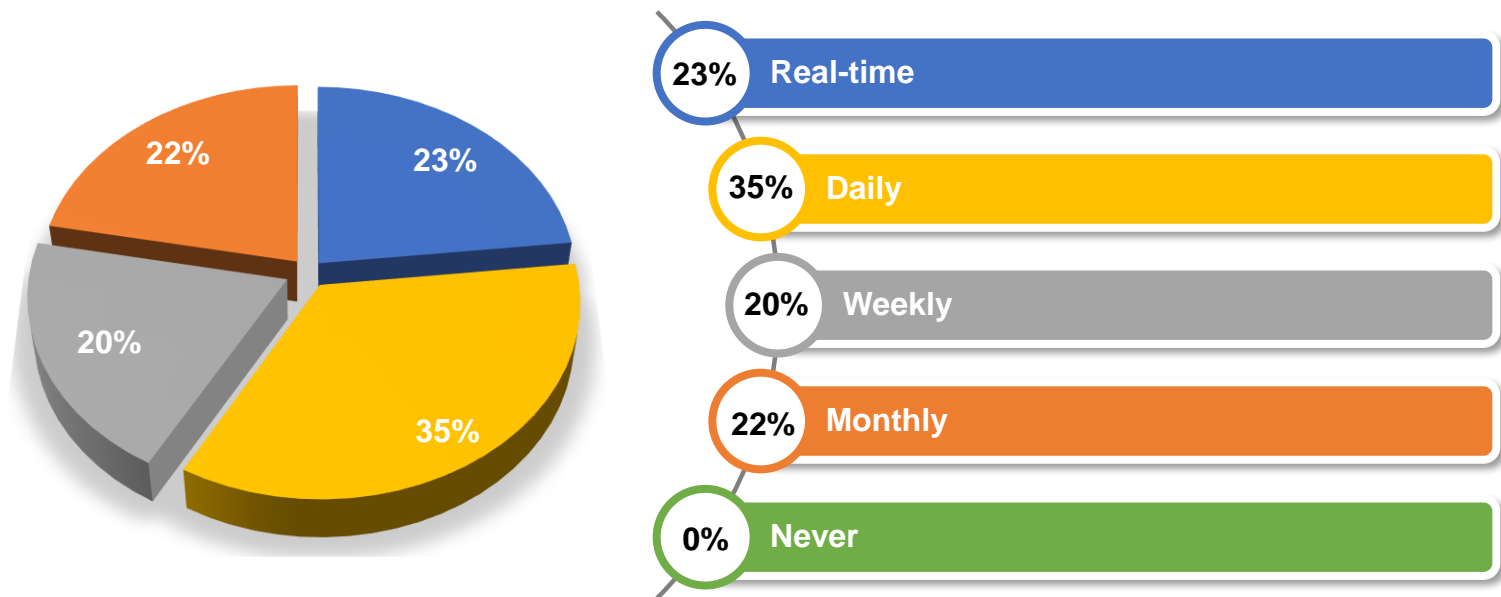
# Q10. Sources of RM data to support decision-making in your organization are:



While most organizations report having RM data to support decision making, the majority indicate the quality/accuracy of the data needs improvement.

The RMI shared the mantra “Capture, Perfect and Automate” during the 2023 State of RM address. It appears most organizations have done a good job capturing RM data; however, few have moved on to perfecting it so that it can be reliably used to support decision-making.

# Q11. How often is resource supply and demand data updated to support decision-making, reporting, and analytics?



58% of respondents have access to data updated at least daily, which is great.

Given previous responses in this survey and our Inhibitors to RM survey, perhaps we have a data quantity over quality issue that effective RM Governance can help redirect and correct.

Inadequate processes and disparate systems are leading to an abundance of supply/demand data, though it's potentially not organized and perfected in a way it can be used effectively.

## Q12. What categories do you use for defining RM performance metrics? (Select all that apply)\*



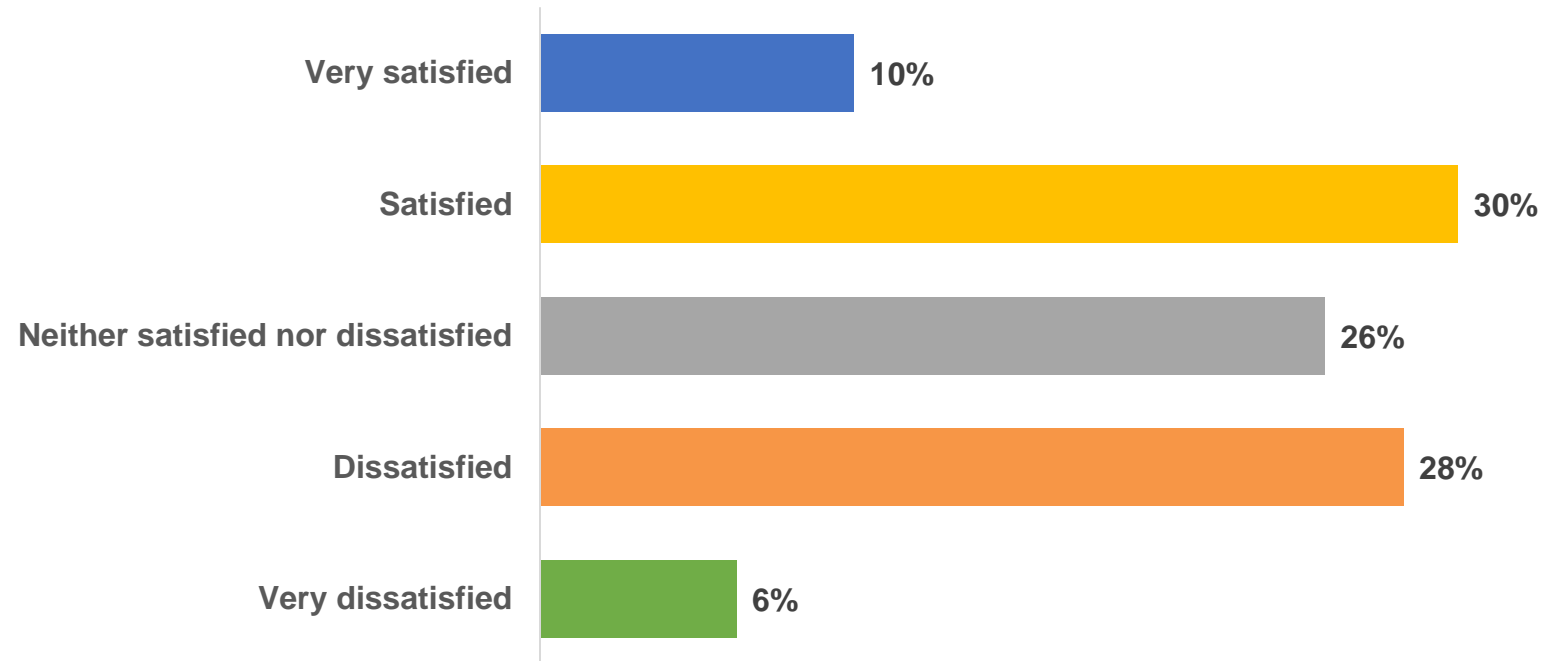
Most organizations use staffing efficiency and productivity metrics to measure RM performance, which indicates RM is predominantly focused on staffing speed over quality.

We see opportunity for RMOs to move the needle by utilizing other business level metrics than the most obvious transactional efficiency metric, in categories such as compliance and accuracy.

\* Multiple responses allowed. Percentages may total to more than 100%

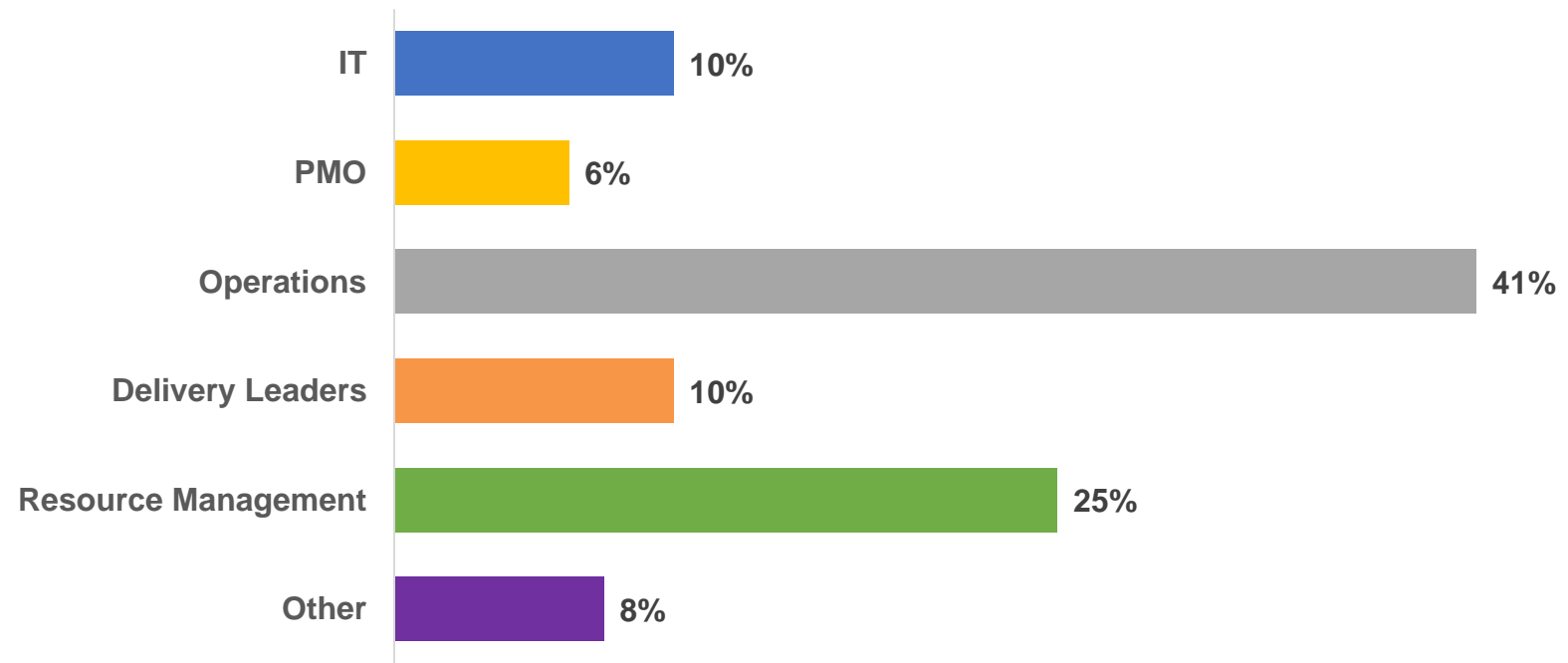


## Q13. How satisfied are you with your PSA/PPM/RPM tool(s) regarding capabilities for enabling and controlling RM data and processes?



Respondents' satisfaction with their PSA/PPM/RPM tool(s) for enabling and controlling RM data and processes varies. 40% of respondents are at least satisfied; however, 26% of respondents are neutral with the remaining 34% either dissatisfied or very dissatisfied with its capabilities.

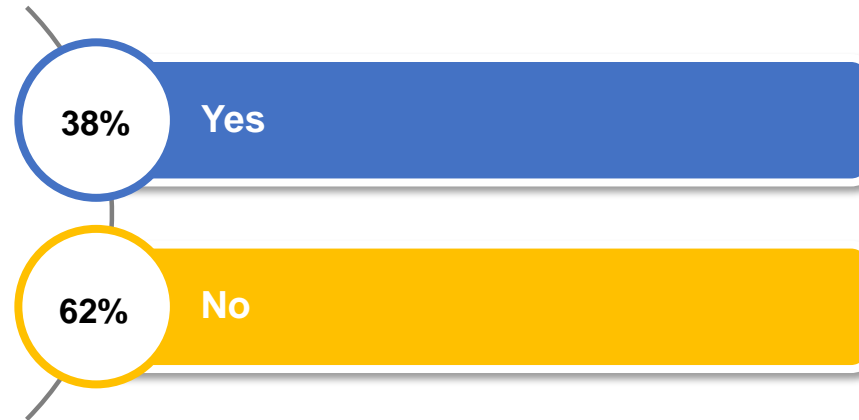
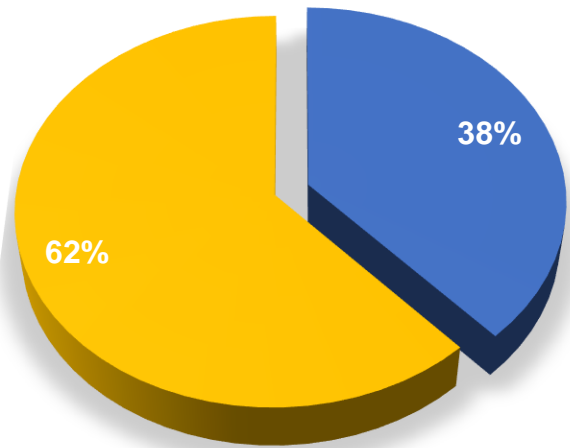
# Q14. Who is responsible for driving PSA/PPM technology adoption in your organization?



It is encouraging to see RM playing a significant role in helping drive PSA/PPM adoption, while other important stakeholders need to be educated and engaged into what is being adopted.

With Operations likely holding the keys to implementing changes, RM should consider how it can best educate the team on notable PSA/PPM enhancements and iteratively collaborate with them on adoption plans.

## Q15. Does your organization have controls in place to monitor adherence of RM processes?



62% of respondents do not have controls in place to monitor adherence of RM processes – not surprising given previous responses in this survey.

Having RM processes in place will only be successful if organizations have controls in place to monitor adherence of these processes.



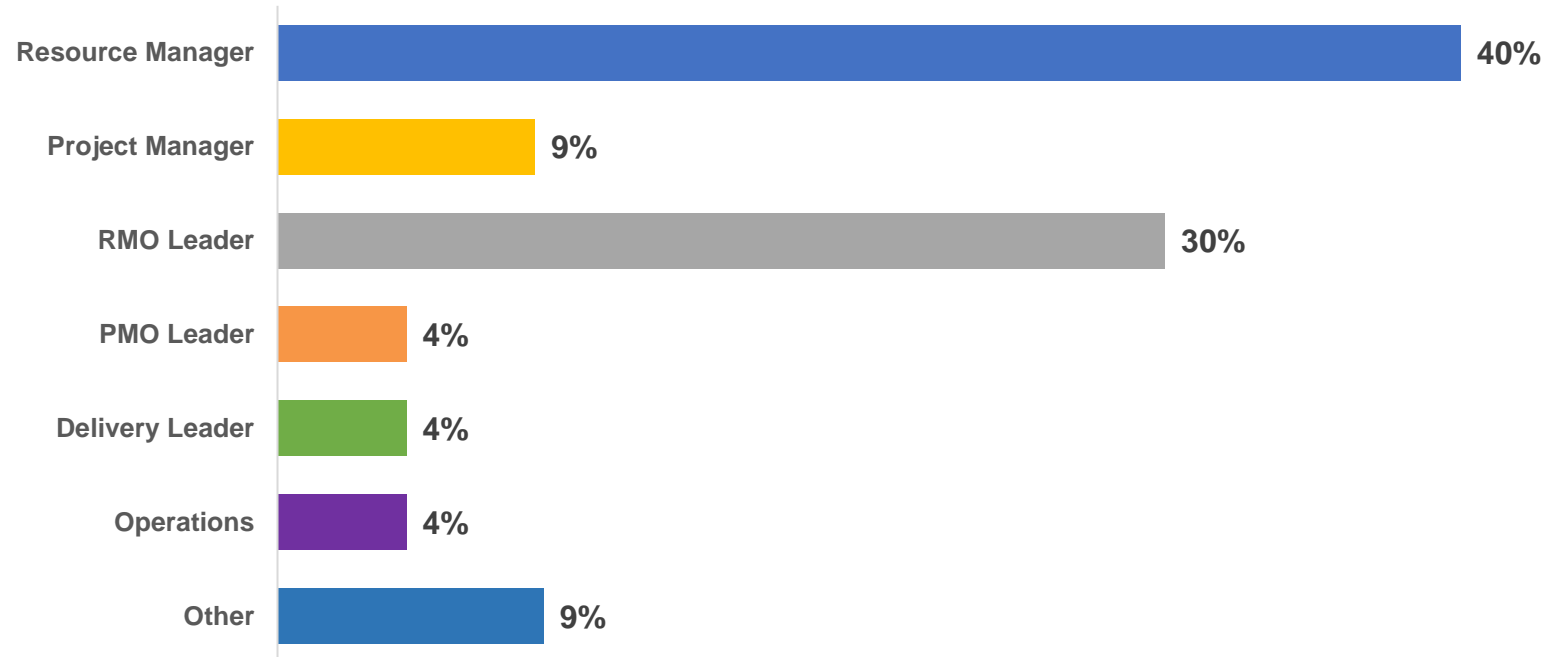
## SERVICES TEAMS SERVING INTERNAL CLIENTS

Enterprise/IT (E/IT)

Product Development (PD)

Engineering (E)

## Q2. Which option best describes your role?



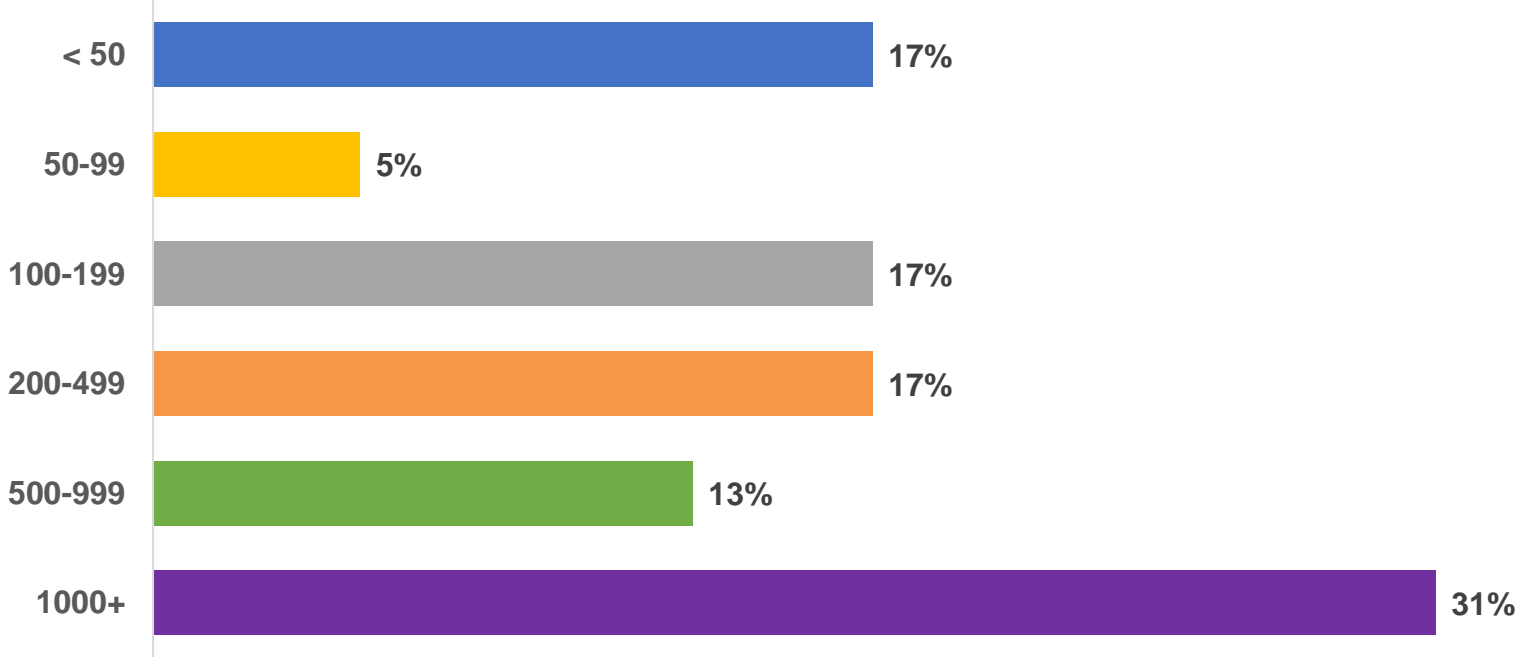
Survey respondents were predominantly those directly involved with leading or operating the RMO.

Notable Other Responses:

- Portfolio Analyst
- Executive



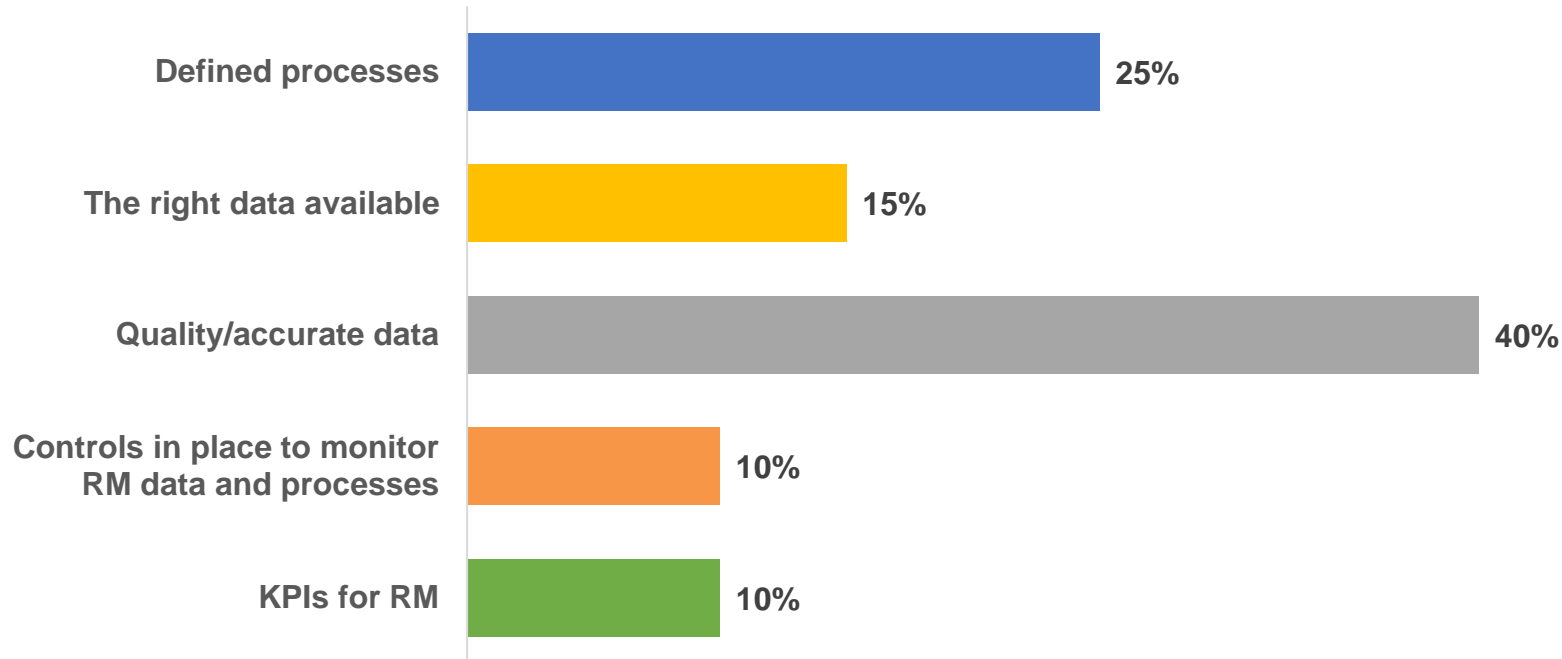
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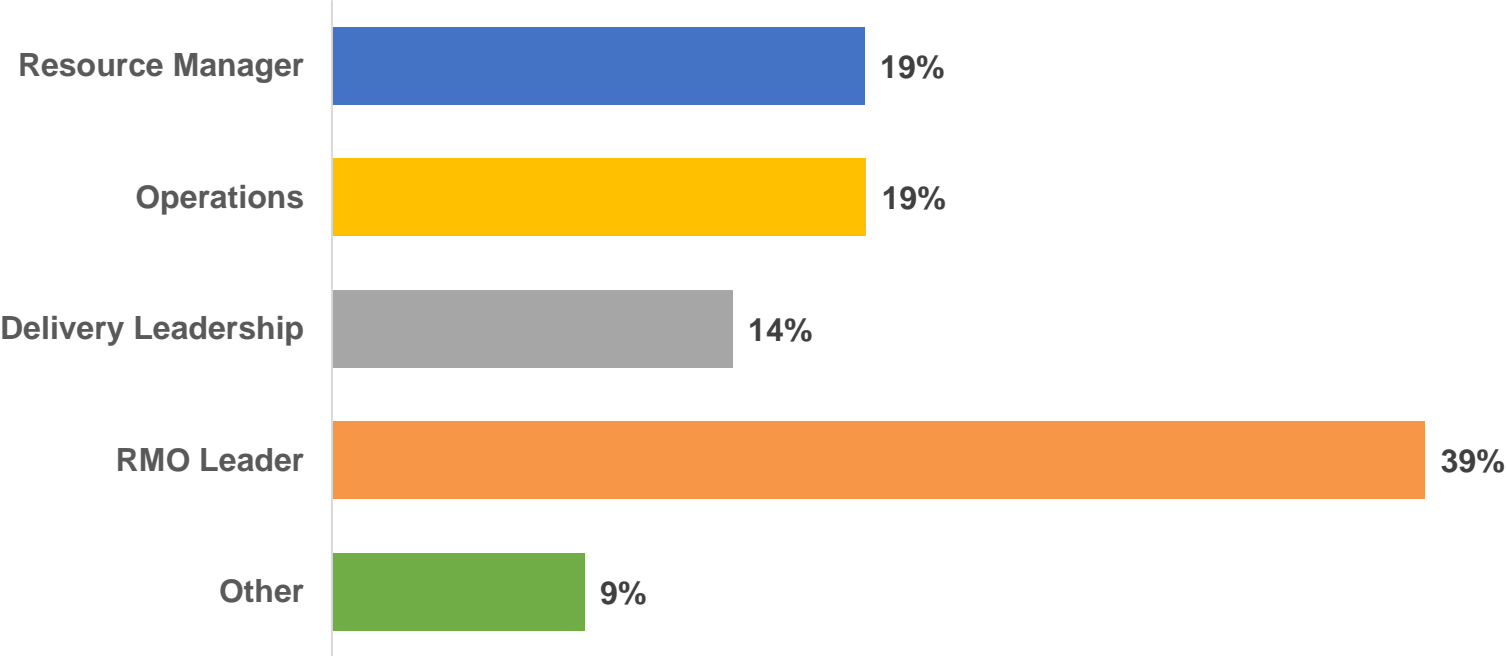
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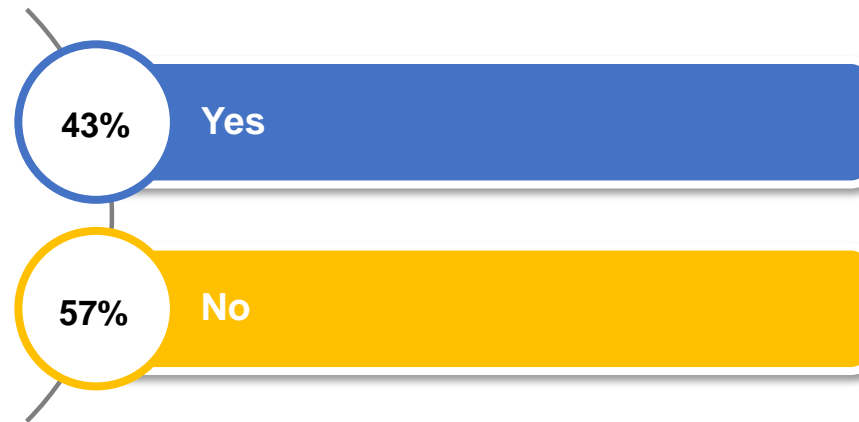
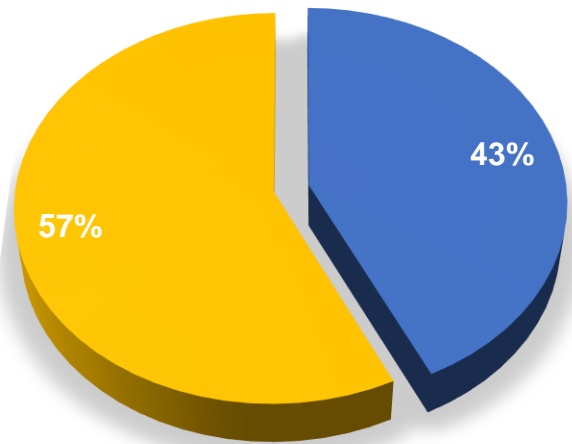
When it comes to RM governance, enterprise organizations serving internal customers believe that the biggest inhibitors are the lack of quality/accurate data and the lack of defined processes.

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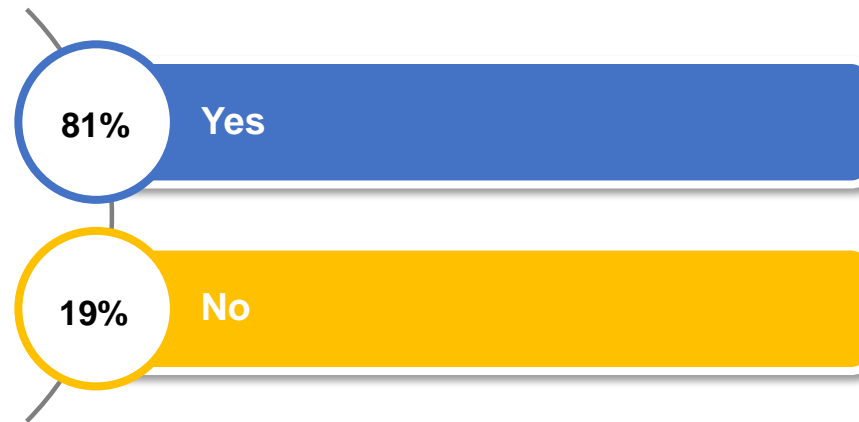
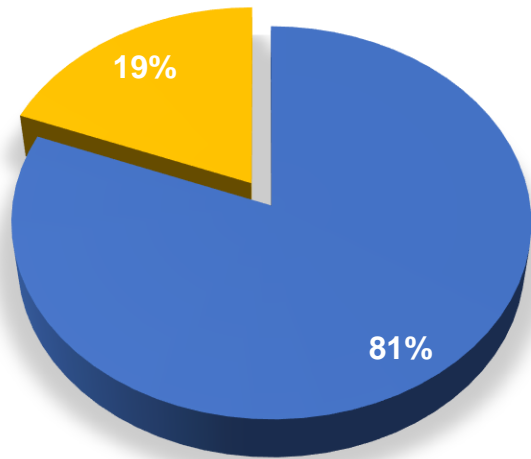
The responsibility of ensuring RM process governance most often falls to RMO Leaders, followed by the Resource Manager or Operations for those from organizations with an internal focus.

## Q6. Does your organization have a documented Charter for your RMO/resource management function?



Having a documented RMO charter is an RMI recommended best practice. The majority of respondents (57%) state their organization does not currently have a documented charter in place. This is an area for focused improvement.

## Q7. Does your organization have RM processes documented and training available?



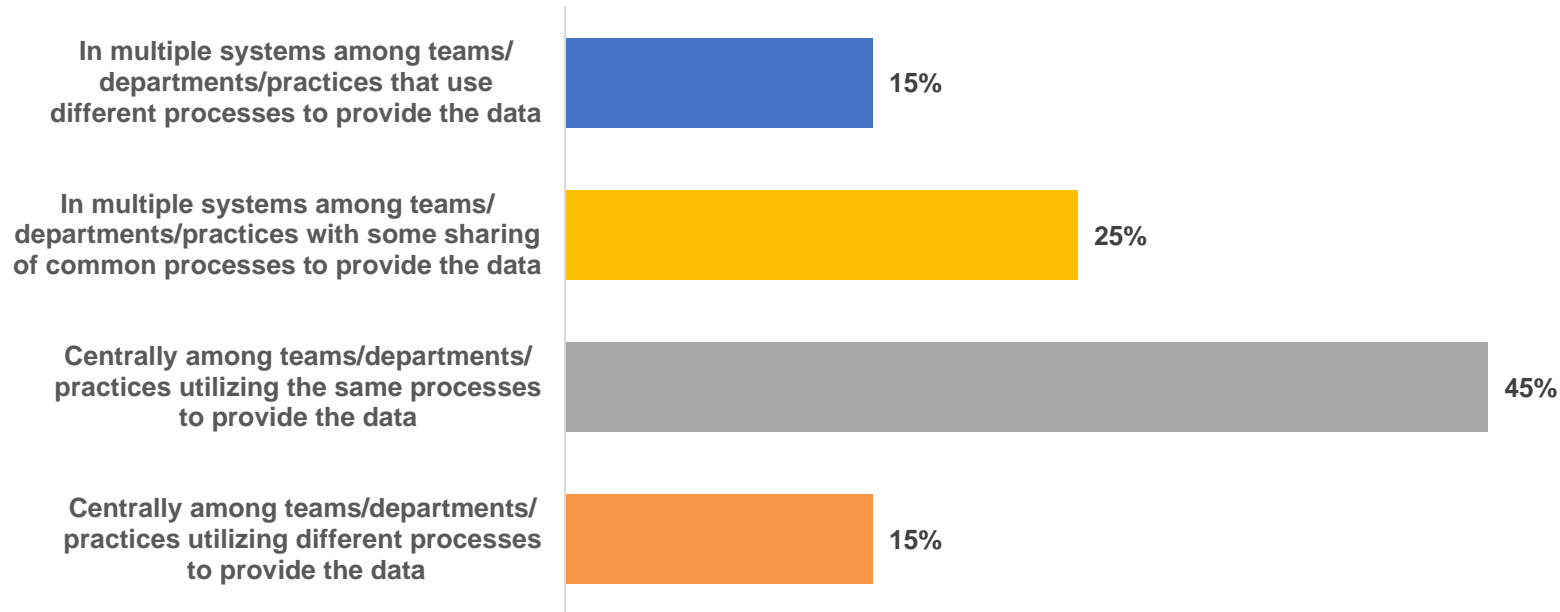
The vast majority of respondents (81%) from enterprise organizations serving internal customers have documented RM processes and training available, an RMI recommended practice.



## Q8. How is resource data stored and managed within your organization?

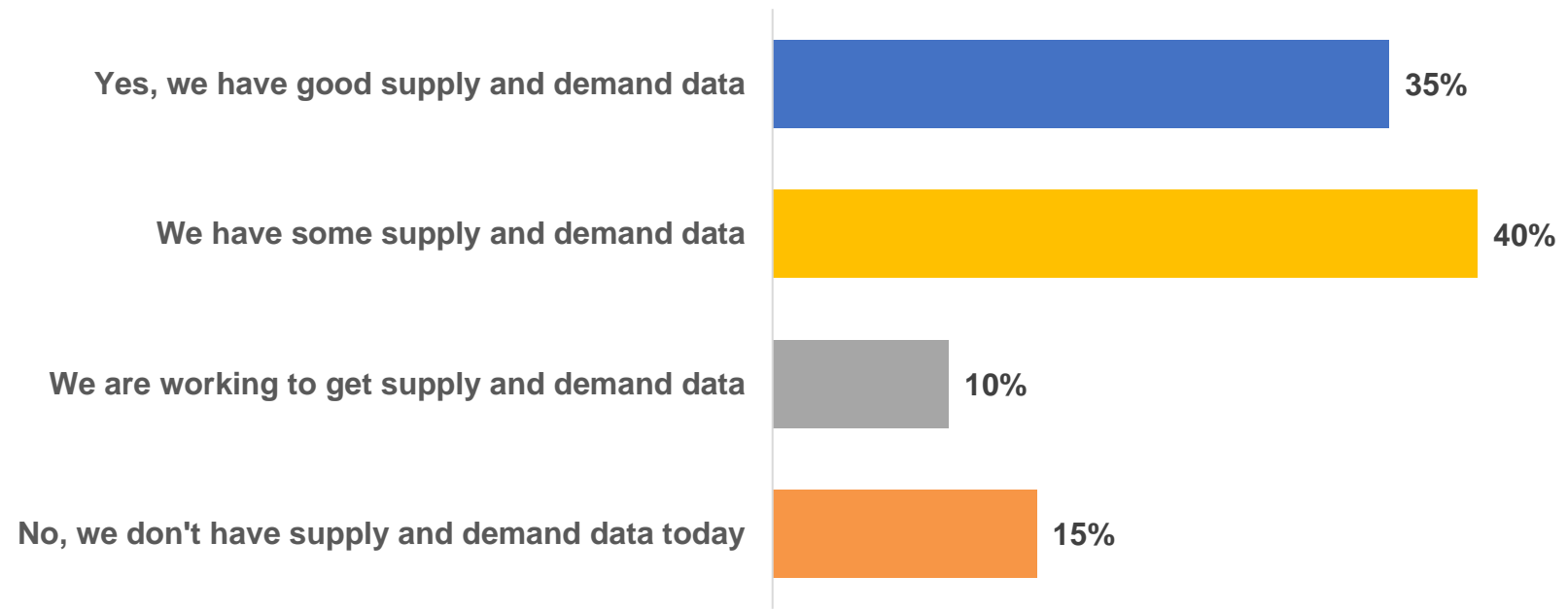
### Data is stored...

#### Resource data is stored and managed:



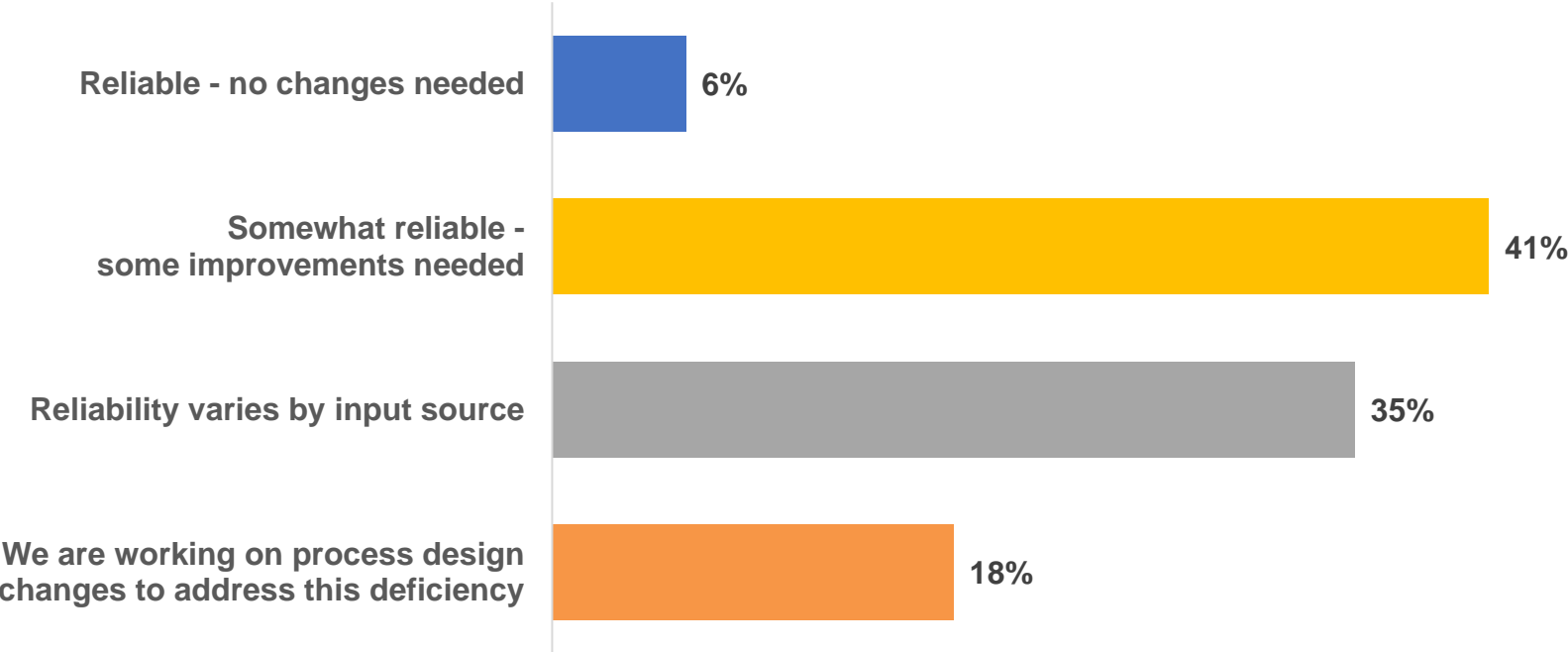
Organizations serving internal customers appear to possess greater control and centralization of data over their client-facing counterparts. With 45% reporting resource data is stored and managed centrally utilizing the same processes, perhaps system simplicity vs. use of multiple best of breed systems is an advantage when it comes to harvesting RM data.

# Q9. Does your organization have resource supply and demand data to support decision-making, reporting, and analytics?



The vast majority of enterprise organizations (75%) have at least some supply and demand data to support decision making efforts, which is encouraging. It is important for these organizations to consider how well the data is being maintained and whether it is being used.

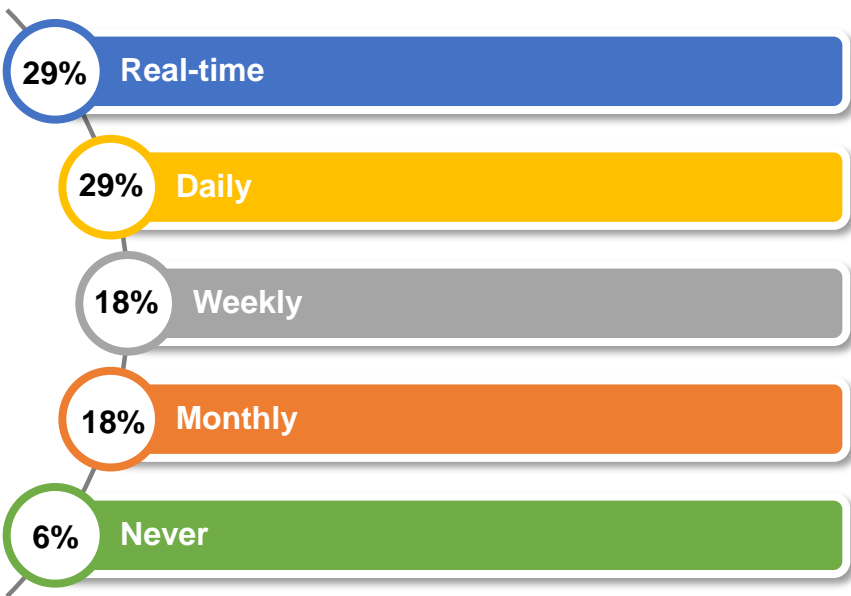
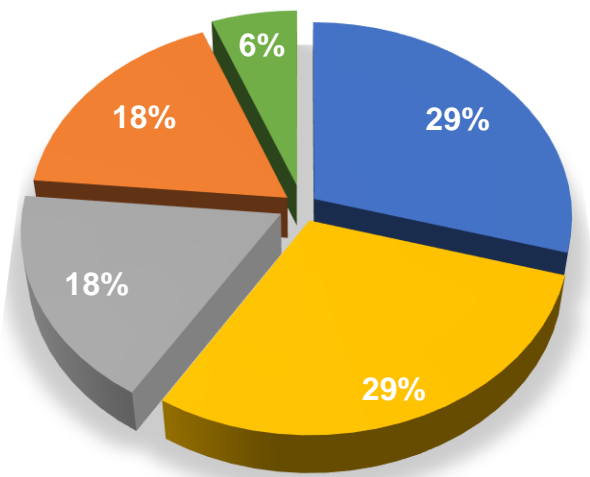
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Inadequate processes and disparate systems are leading to an abundance of supply/demand data, though it's potentially not organized and perfected in a way it can be used effectively.

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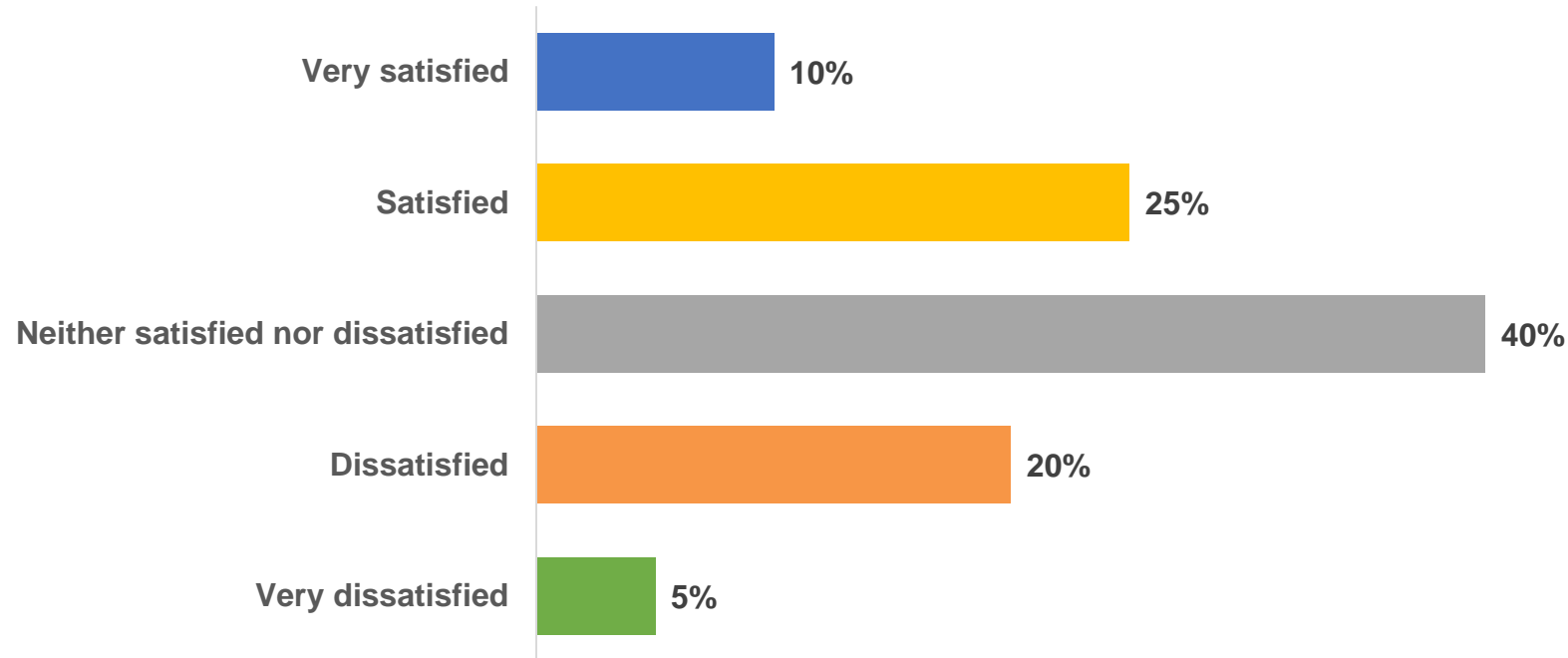


While half of respondents utilize staffing efficiency and compliance metrics, directional improvement is still needed across all four of these key RM performance categories. Internal enterprise organizations trail their external counterparts by a significant margin here.

\* Multiple responses allowed. Percentages may total to more than 100%

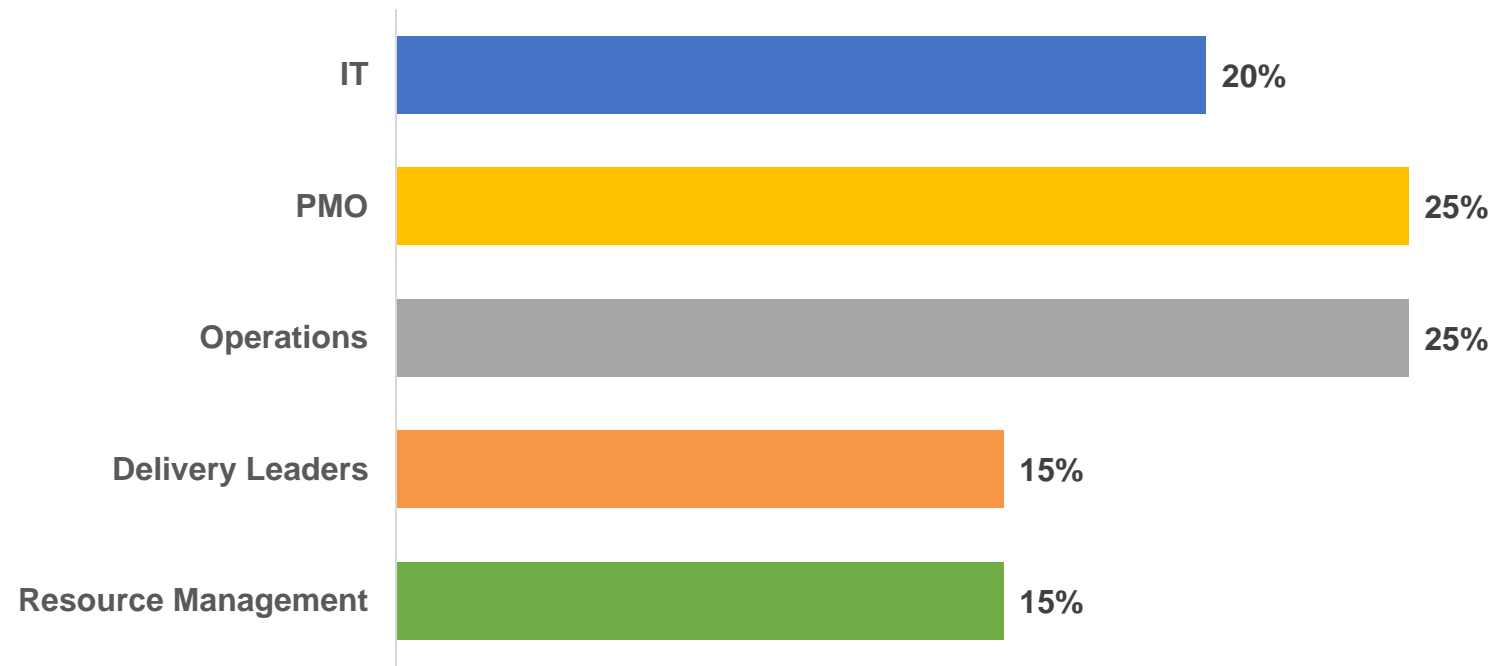


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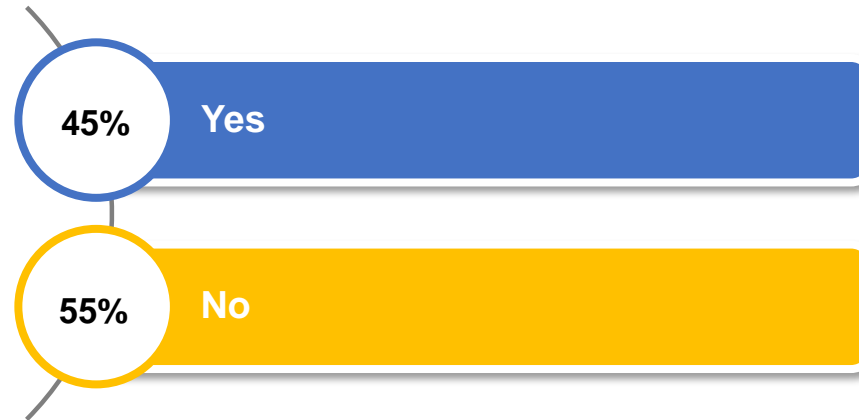
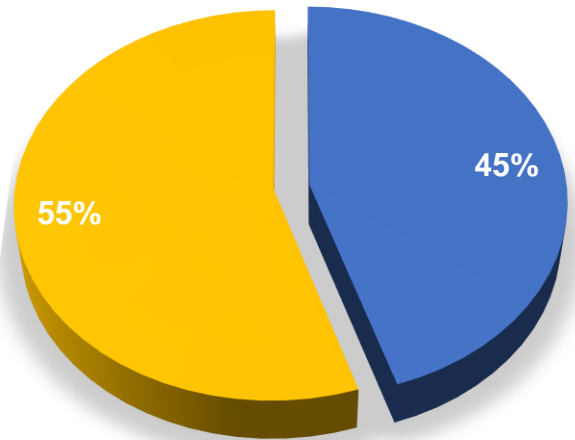
# Q14. Who is responsible for driving PSA/PPM technology adoption in your organization?



Responsibility for driving PSA/PPM technology adoption varies by organization with the PMO and Operations being the most selected.

It is important to understand who is driving adoption of new features, configuration, and updates, as well as ensuring the PMO/Operations are collaborating with RM on adoption plans.

## Q15. Does your organization have controls in place to monitor adherence of RM processes?



55% of respondents do not have controls in place to monitor adherence of RM processes – not surprising given previous responses in this survey.

Having RM processes in place will only be successful if organizations have controls in place to monitor adherence of these processes.



# Survey Summary





# Key Takeaways

- 1 Effective Resource Management is highly dependent on a centralized capability that oversees the infrastructure and processes to manage the inputs and outputs related to all RM functions. As evidenced in this research report, overall industry focus on RM governance needs to rise.
- 2 The biggest inhibitor to RM governance is the lack of well-defined processes that in turn help support quality data for decision making purposes. A fundamental starting point is to focus on developing a well-defined charter for the RMO.
- 3 Data quality is an ever-present concern. Decision-making depends on sound data. More energy needs to be spent focusing on data hygiene and coalescing potentially disparate systems and processes around a core subset of data needed by Resource Management. The mantra of capture, perfect and automate is central to advancing the data we use and how our PSA/PPM systems use it to help with decision-making.
- 4 While survey respondents overwhelmingly shared that RM owns RM Governance, there is room to move the needle more on the RMO charter and process development, as well as inserting the proper controls to monitor process adherence.





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