



September 23 and 25

Unlocking the Power of PSA

Maturing Resource Management for Technology Adoption

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RMI

Agenda

- 1** Transformation
- 2** PSA Tools: Capabilities & Assumptions
- 3** RM Maturity Matters
- 4** PSA Technology: Are Your Processes Ready?
- 5** Unlocking PSA Powers

Can PSA tools be transformative?

Transformative Definition:

Causing or able to cause an important and lasting change in someone or something

Character Transformations

Bruce Banner



HULK™

Carol Danvers



Captain Marvel™

Prince Adam



He-Man™

What do all of these characters have in common?

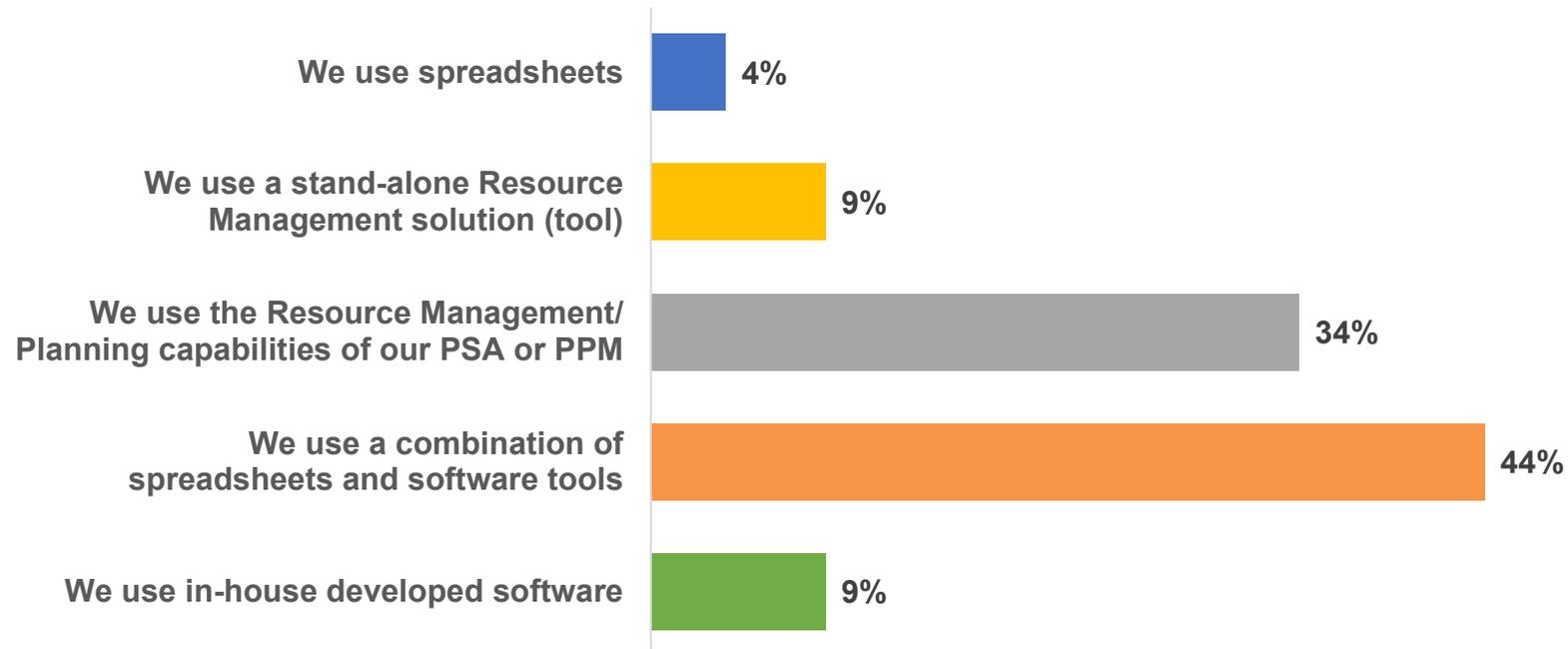
Something caused an important and lasting change for them to obtain their power



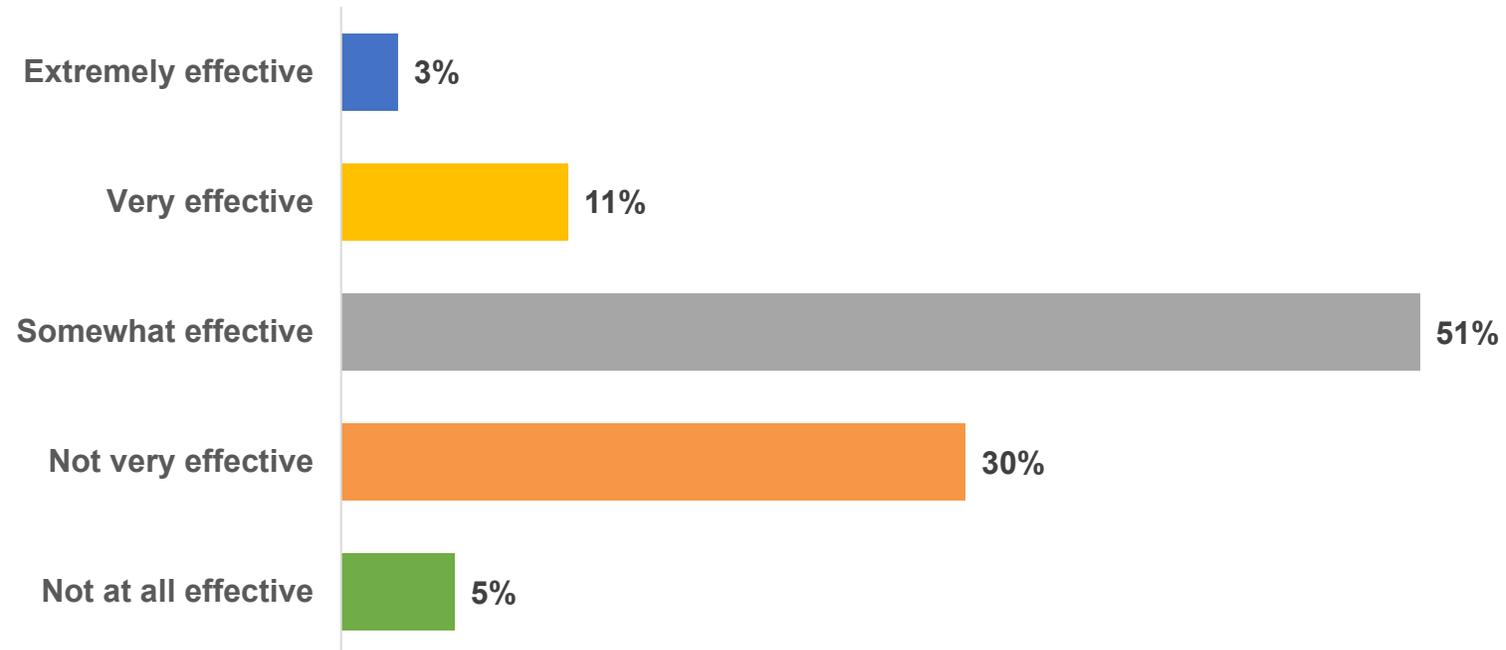
Poll Question #1

**How confident are you that the power of your
PSA technology is being fully utilized?**

How would you describe the state of resource management automation within your organization?



How effective is your automation tool in supporting resource management processes?



PSA Tools: Capabilities & Assumptions

Core Capabilities of PSA Solutions

 <p>Resource Management</p>	 <p>Project Management</p>
 <p>Business Intelligence & Reporting</p>	 <p>Workflow & Automation</p>
 <p>Financial Management</p>	 <p>Governance & Compliance</p>

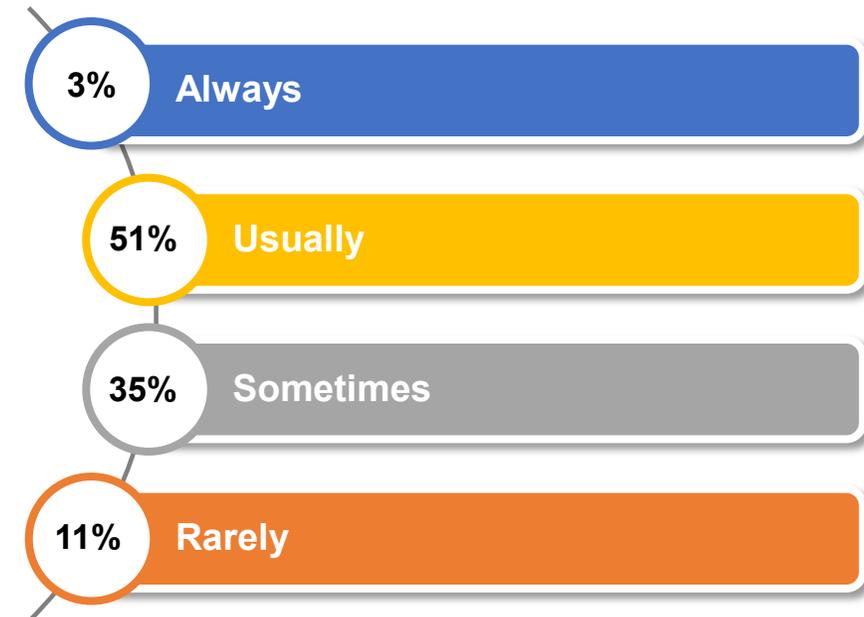
PSA solutions transform service delivery through an array of business benefits



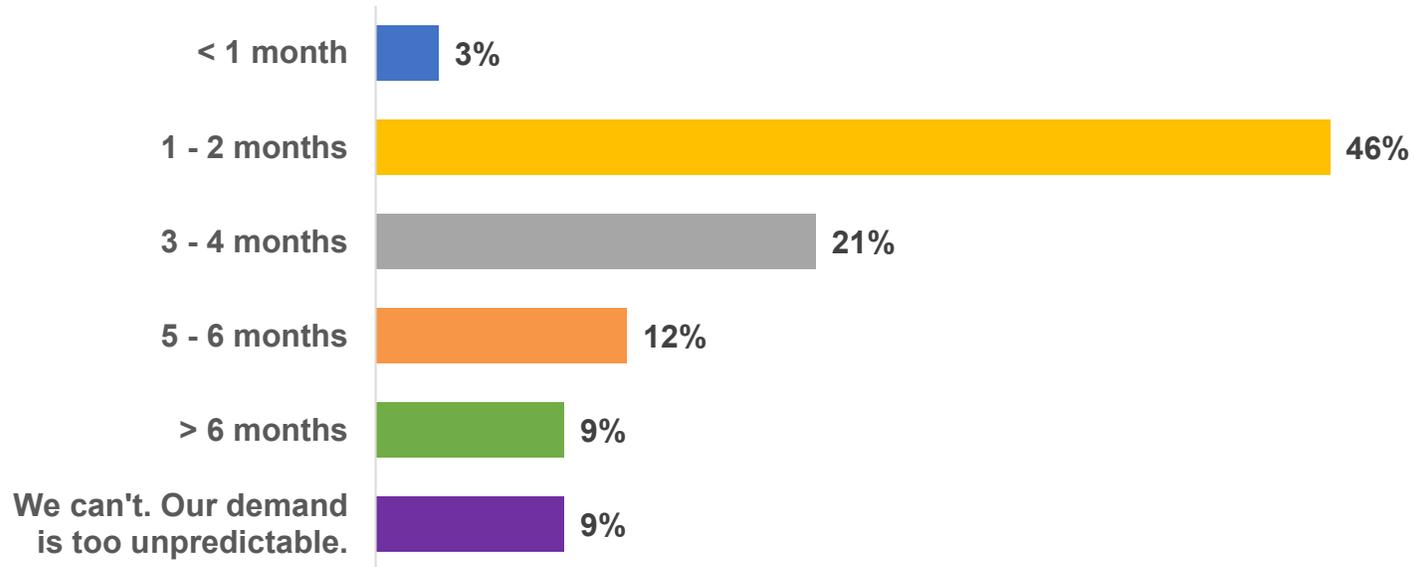
Perhaps...PSAs can open a portal to a different RM game all together?

- Capability Overview
 - Project Plan & Scheduling
 - Project Roles & Allocation
 - Project Budget & Financial Tracking
 - Collaboration Tools
 - Progress Reports
 - Issue/Risk Mitigation
- Assumptions
 - Clear roles & responsibilities
 - Defined project lifecycle stages & tasks
 - Reliable data entry & discipline
 - Standardized project processes
 - Cross-functional collaboration

Are project delivery timelines and deliverables consistently met?



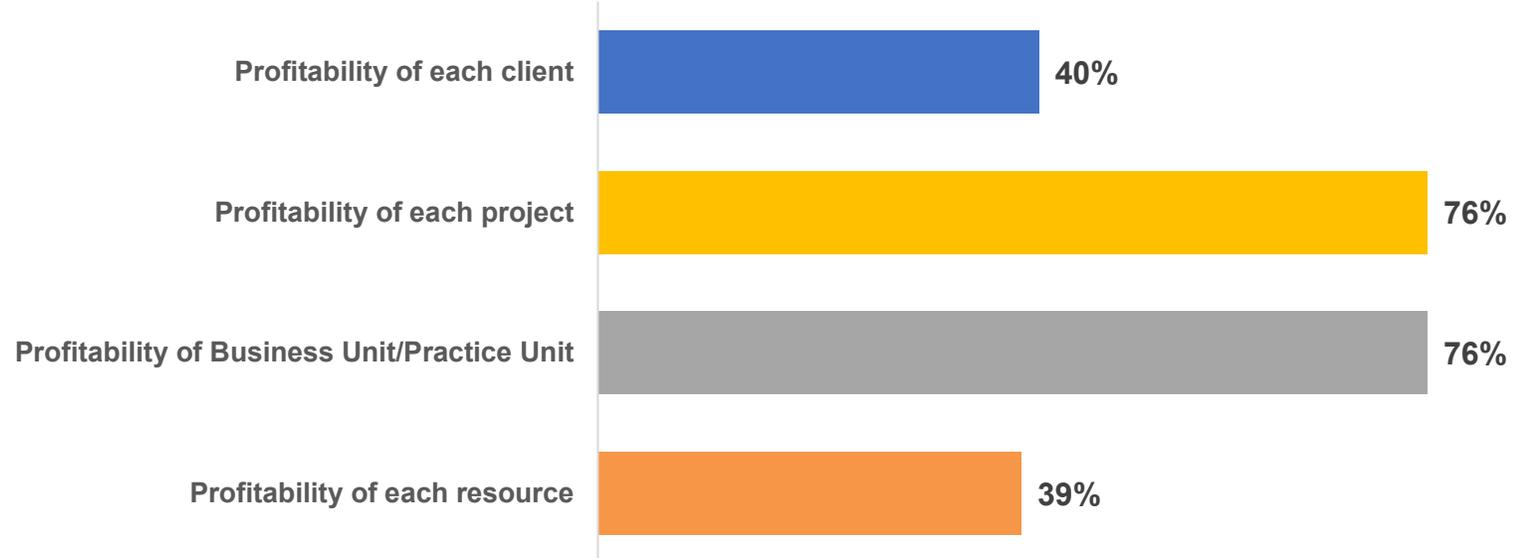
On average, how far out can you forecast future resource demands?



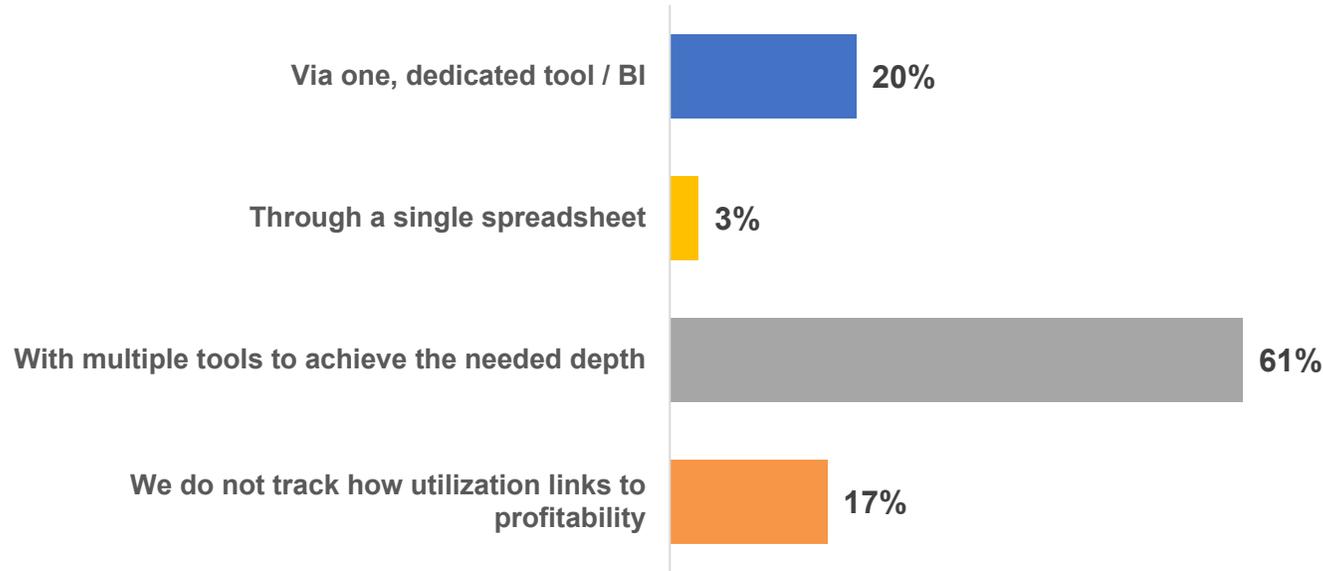
- Capability Overview
 - Role Definition
 - Skill/Proficiency Mgt
 - Capacity Planning
 - Resource Scheduling
 - Scenario & Forecast Planning
 - Allocation Tracking & Metrics
- Assumptions
 - Clear Roles & Skills
 - Defined Resource Request Process
 - Structured Demand Planning Process (Prob % & decomposition)
 - Pre-defined work streams
 - Time Tracking Discipline
 - Collaboration & coordination processes between departments

- Capability Overview
 - Operational dashboards
 - Utilization & Capacity Reports
 - Financial Reporting
 - Performance Metrics (person, project, practice)
 - Forecast Accuracy
- Assumptions
 - Standardized data structure
 - Reliable data entry
 - Clear data quality governance
 - Defined KPIs
 - Connectivity to core systems (CRM, ERP, HRIS, etc.)

Which performance criteria do you track?
(check all that apply)*



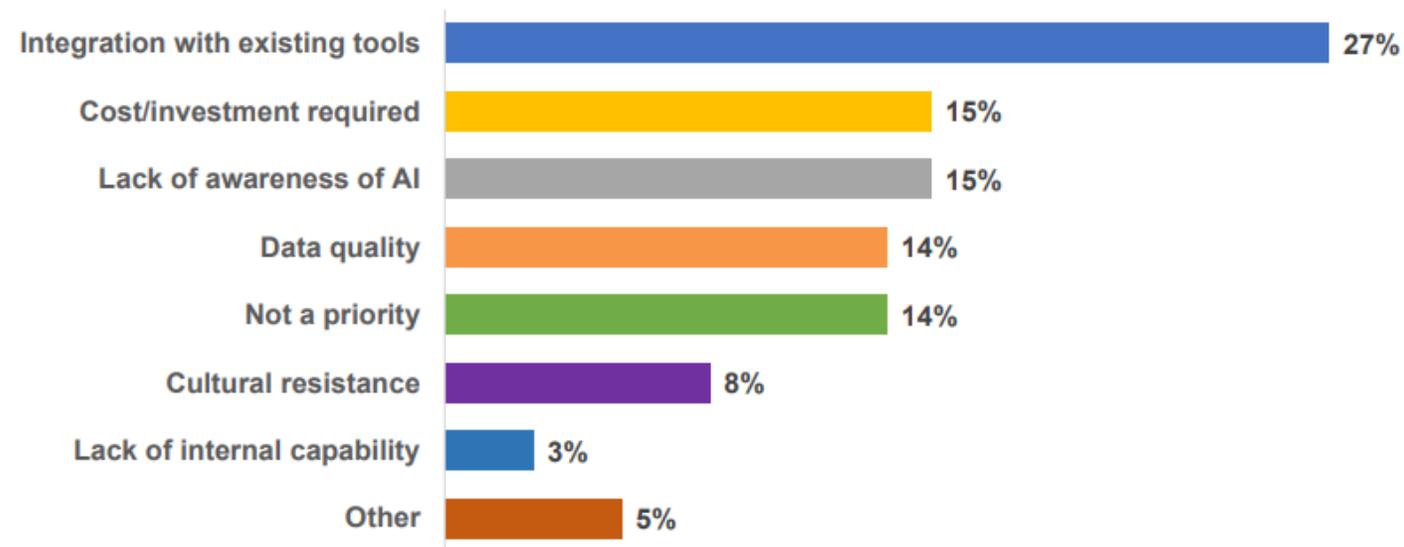
If your organization currently links utilization to profitability, how do you do it?



- Capability Overview
 - Project Budget
 - Billing Rules
 - Time Tracking & Expense Mgt
 - Project work ties directly to billing and rev recognition
 - Profitability Analysis (project, dept, resource)
 - Accounting Integration capability
- Assumptions
 - Projects map to budgets & billing models
 - Real-time tracking of costs, revenue and margins
 - Integration with invoicing/expense systems
 - Financial accountability at project level

- Capability Overview
 - Auto-initiate projects from Opportunities
 - Approval workflows
 - Notification & Alerts (i.e. overdue tasks, timesheets, escalations)
 - Auto-match resources to projects
 - Integration triggers
 - Customer updates/satisfaction
- Assumptions
 - Standardized processes – project, resource, financial clearly defined
 - Reliable & timely data entry
 - System Integration Readiness
 - Change Management process
 - Culture of Accountability

What's the biggest barrier to using AI more effectively in your operations?



- Capability Overview
 - Approval Workflows
 - Audit Trails
 - Contract & Document Mgt
 - Risk & Issue Tracking
 - Reporting
- Assumptions
 - RM Charter
 - Defined policies & procedures
 - Clear role definitions
 - Consistent data entry
 - Audit & review culture
 - Exception management processes





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- PSAs are dynamic tools, regularly give them some attention
- Keep data clean & current – garbage in, garbage out
- Align PSA capabilities with your business processes – strategic planning conversations with your provider can go a long way
- Invest in role-based training
- Review & refine workflows – smoother workflows lead to fewer operational bottlenecks
- Celebrate wins & improvements



Poll Question #2

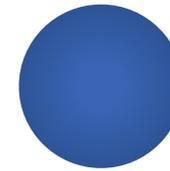
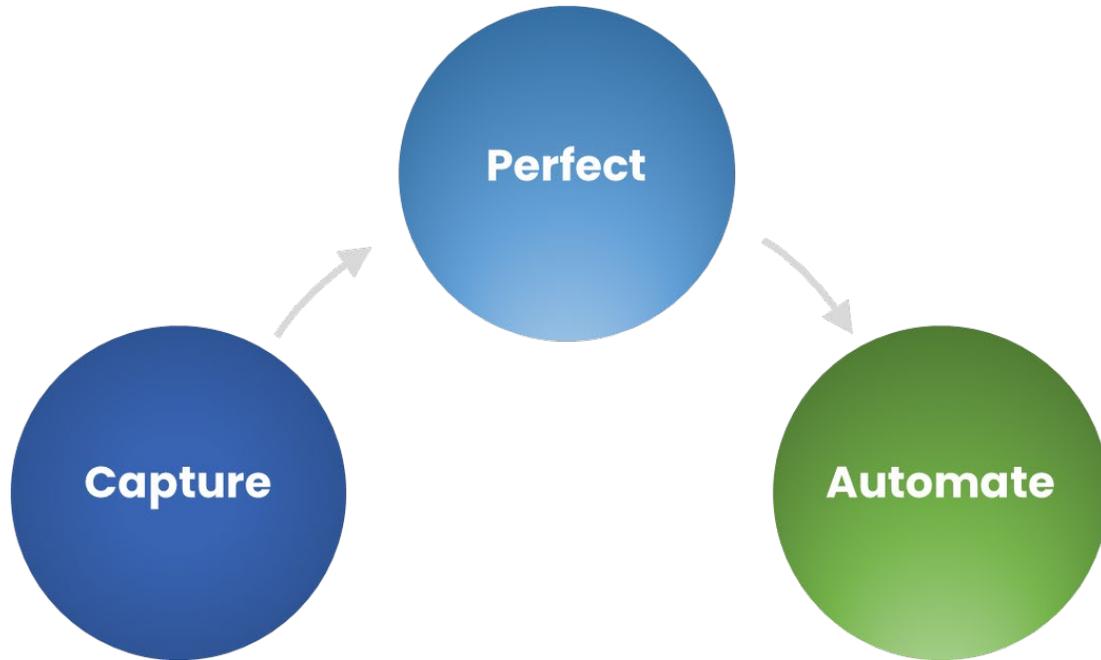
Knowing what you know now about PSA capabilities. If you had a relationship status conversation with our current PSA, what would you say to it?

RM Maturity Matters



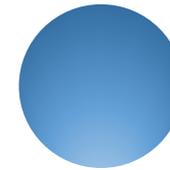
Process Maturity

- Technology thrives in environments where processes are predictable and repeatable
- Without process discipline, even the best tech can produce misleading insights
- Governance bridges the gap between tech capability and business value
- **Process maturity** unlocks the full potential of PSA tools



Capture

Clearly identify who owns and is responsible for the data? Is it realistic?



Perfect

Use your process framework to iterate through the data to get it right.



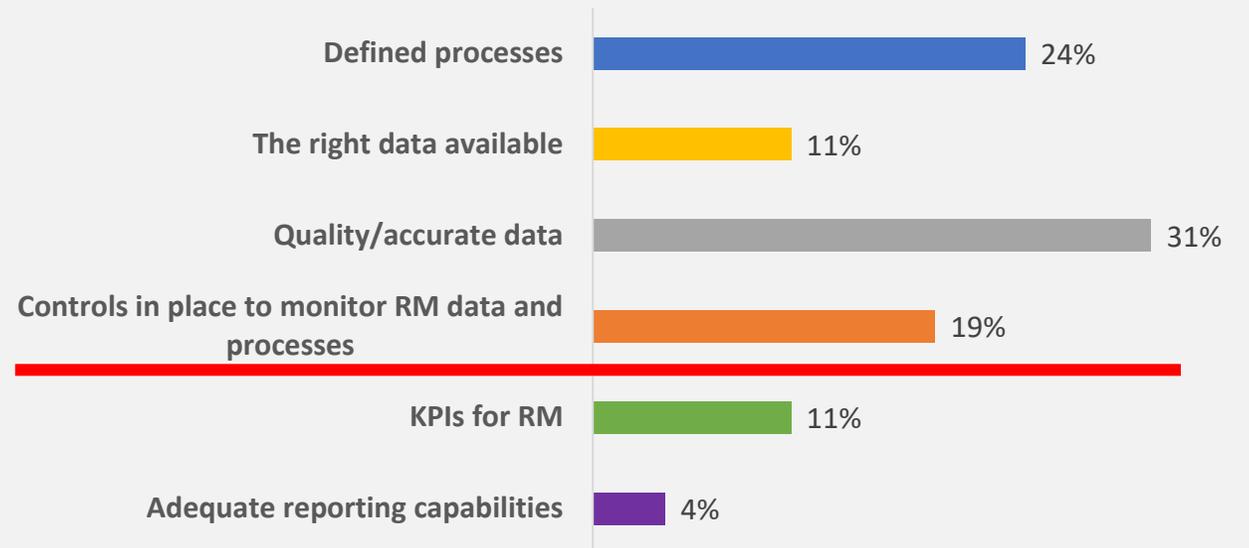
Automate

Then, look to automate it through your RM automation tools.

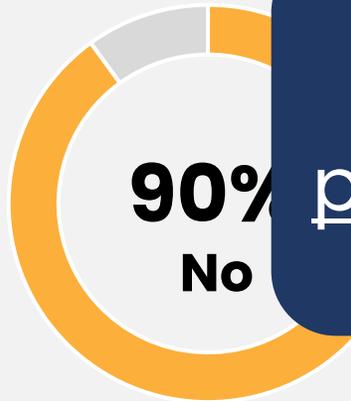
Effective Resource Management is highly dependent on a centralized capability that oversees the infrastructure and processes to manage the inputs and outputs related to all RM functions.

85% of the leading inhibitors to RM governance can be attributed to lack of well-defined processes that in turn help support quality data for decision making purposes.

Our biggest inhibitor to RM governance is a lack of:



Are you currently using artificial intelligence features to support your resource management initiatives?



90% report that they are not yet using AI features to support RM

For Automation to work, the underlying processes and data need to be accurate



PSA Technology: Are Your Processes Ready?

Benchmarking Current Maturity

What is it?

- A framework to drive organizational self-assessment of RM capabilities
- It is structured based on the RMI's Just-in-Time Resourcing® process solution
- Two versions: one for client-facing service organizations and another for internal enterprise organizations

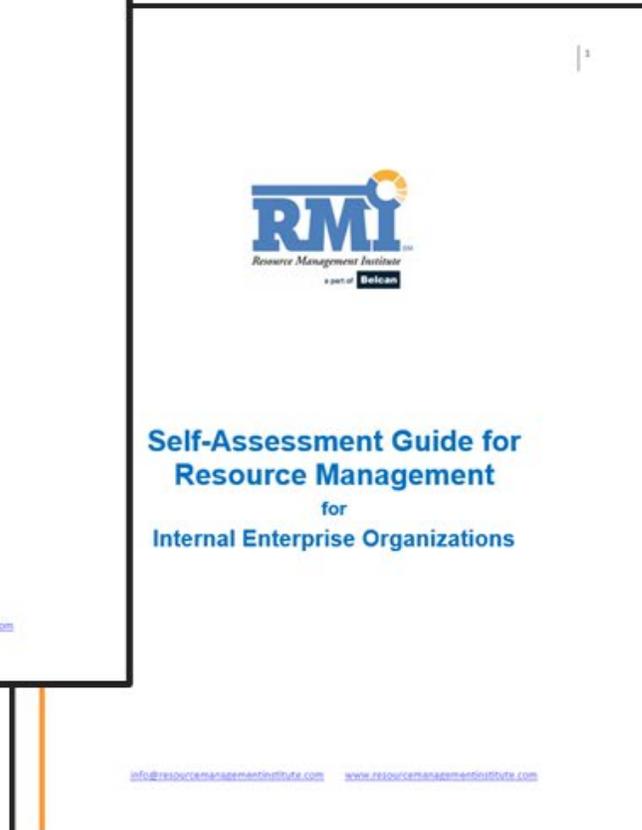
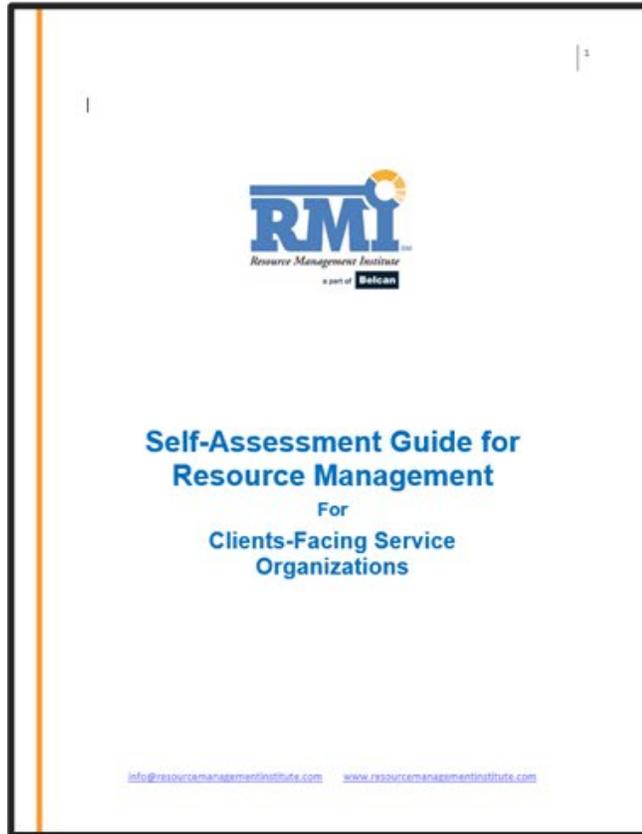
How to use it?

- Choose the version that applies to your organization.
- Conduct a self-assessment to help determine where you stand.
- Be honest! Set aside the rose-colored glasses and be objective

	Level 1	Level 2	Level 3	Level 4	Level 5
Organization	<ul style="list-style-type: none"> • RM is done organically by delivery teams • No dedicated RMs performing Resource Management 	<ul style="list-style-type: none"> • Existence of RMs working directly for individual teams • Resources are viewed as belonging to individual teams 	<ul style="list-style-type: none"> • RMO in place with a clear charter to define and execute processes across the organization • Some capability for visibility to resources across teams 	<ul style="list-style-type: none"> • RMO is global, centralized model • RMO is organizationally positioned to be objective (free from influence of organizational silos) • Resources viewed as belonging to organization (vs. a particular department) • RMO starting to take responsibility for some key organizational metrics 	<ul style="list-style-type: none"> • RMO is strategic global function with seat at the table • RMO invested in and supported like other operational functions • RMO is integral to achieving organizational goals (customer/employee/financial)
Skills Inventory	<ul style="list-style-type: none"> • Role names are inconsistently used across teams and not standardized • Understanding of skills and capabilities is tribal • No Skills Inventory 	<ul style="list-style-type: none"> • Some framework for role definition, but not controlled • Skills are tracked in a decentralized manner • No process around skills input or updates 	<ul style="list-style-type: none"> • Skills Inventory and profile data managed centrally across the organization • Limited confidence in skills data and accuracy • Roles formally defined and consistent across teams 	<ul style="list-style-type: none"> • Skills Inventory and profile data managed centrally with documented governance process • Ongoing process for resources to update skills • Skills and roles are normalized across organizational boundaries • Skills data is utilized to support skills development initiatives • Role names and definitions consistently align with the rates and costs of resources 	<ul style="list-style-type: none"> • Skills and roles are well known and understood by the organization with strong compliance • Skills inventory is utilized strategically to track employee aspirations and assist with employee engagement • Ongoing quality management process • Skills data is synchronized across HR and delivery systems
Staffing	<ul style="list-style-type: none"> • Staffing activity occurs after a deal is sold • Lack of clarity in understanding resource and role requirements of new projects 	<ul style="list-style-type: none"> • Staffing is decentralized and performed by line managers for their resources • Requests for resources come from many sources and in many forms • Limited capability to share resources across teams • Little to no ability to conduct scenario planning 	<ul style="list-style-type: none"> • Staffing discussions occur prior to a deal being closed/won by sales • Staffing function is facilitated centrally to support cross-team sharing of resources • Limited way in which resources are requested 	<ul style="list-style-type: none"> • Resource request process is well-defined and followed across the business, including prioritization and resolution process for staffing conflicts. • Most new work streams have a defined resource plan and soft-booked resources prior to being closed/won by sales 	<ul style="list-style-type: none"> • All new work streams have a defined resource plan and soft-booked resources prior to being closed/won by sales • Centralized RMO utilizes scenario planning for resource assignments • Staffing effectively balances keeping employees satisfied while meeting the demands of the business

RMI Member Access:





RMI Member Access:

Governance

Good processes typically have good governance to ensure they are followed and continuously improved and adopted. If you have not scored as well in prior process areas, chances are your governance maturity may be in a similar state. You will see from the criteria below that more mature resource management functions are more strategic and this is reflected in what metrics are measured and tracked.

Level 1	Level 2	Level 3	Level 4	Level 5
<ul style="list-style-type: none"> No documented RM processes No monitoring or controls in place No tracking of RM KPIs 	<ul style="list-style-type: none"> Ad hoc RM processes exist Monitoring happens in an ad hoc manner and for limited RM functions 	<ul style="list-style-type: none"> RM processes documented and training provided Consistent monitoring of RM process compliance Some KPIs in place for RM functions 	<ul style="list-style-type: none"> Defined KPI's for RM performance and related process performance Timely and accurate reporting and analytics of performance Organizational accountability clearly defined Developing continuous improvement processes 	<ul style="list-style-type: none"> Well defined accountability, monitoring and tracking of key RM processes Real time reporting and analytics on performance Strong measurement of all aspects of RM performance Continuous improvement processes in place

Your maturity score for Governance is: 1

Summary and Interpreting Results

Now that you have scored your maturity for each category, do the following:

Add your score from all seven categories:	14
Divide your total score by seven	7
This is your RM Maturity Assessment Score:	2

- Determine your RM Organizational structure/model
- Define sources of demand and decompose high probability work it into meaningful resource data with a documented process that support it
- Define staffing processes and staffing rules, RACI models on who does what and what information gets updated
- Identify your sources of talent whether externally or internally and indicators depicting when new supply becomes available
- Start somewhere, define process expectations and audits to ensure proper governance

FOUNDATIONAL PRACTICES

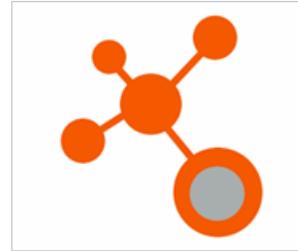


With Great RM Process Maturity Comes Great Power



Status Quo

- Heavy use of Excel
- Low level of integration
- Bespoke and/or home-grown solutions



Automated

- Use of “enterprise class” third party applications, i.e. PSA, RM commercial SW
- Higher degree of integration
- Use of transactional data to drive better decision-making



Transformed

- Automation of progressive, and proven, business processes
- Customer and business partner collaboration (broaden the ecosystem)
- Use of AI and advanced BI/analytics for decision-making

Maturity Level



~25% of companies in an RMI survey are not using automation tools for RM



For those using tools, 35% - 40% state are not very effective. Over half still use or augment systems with spreadsheets



Forecasting & capacity planning still the #1 challenge. AI starting to appear, 8%-12% with initiatives in this area.

Unlocking PSA Powers



- 1. Consistent, Scalable Processes**
- 2. Reliable Inputs for Automation/Analytics/AI**
- 3. Ownership & Trust in Data Quality**
- 4. People Productivity Conduct**
- 5. Align Stakeholders**

Key Takeaways

- 1** Unlocking the Power of PSA is not a destination — it's a journey.
- 2** The yellow brick road of process maturity is filled with potholes we must work to pave smooth to take full advantage of PSAs
- 3** Explore the capabilities of your PSA
- 4** Focus on the process & data controllables and influence the rest
- 5** Leverage the RMI's RM Maturity Model and Key Power Plays and drink from the PSA Power Formula to help plot your path forward

By the Power of PSA...



Don't be mild-mannered
Prince Adam

TRANSFORM your process
maturity to fully unlock the
Power of your PSA

Declare to all...
I HAVE THE POWER!

Thank You!