



## Power UP

### Data Management Best Practices for Resource Management

December 8, 2021

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# RMI Mission



The RMI is dedicated to the advancement of resource and workforce management thought leadership, best practices and standards, globally recognized credentials that certify resource and workforce management expertise, and tools and resources necessary for effective and efficient management of human capital intensive businesses.

[www.resourcemanagementinstitute.com](http://www.resourcemanagementinstitute.com)

**We are helping companies via better resource management to achieve improvements in:**

- Project performance
- Resource utilization
- Customer satisfaction
- Employee engagement/retention

**We do this by providing:**

- Best practice definition and development
- Market research and white papers
- Training and education
- Industry collaboration/events

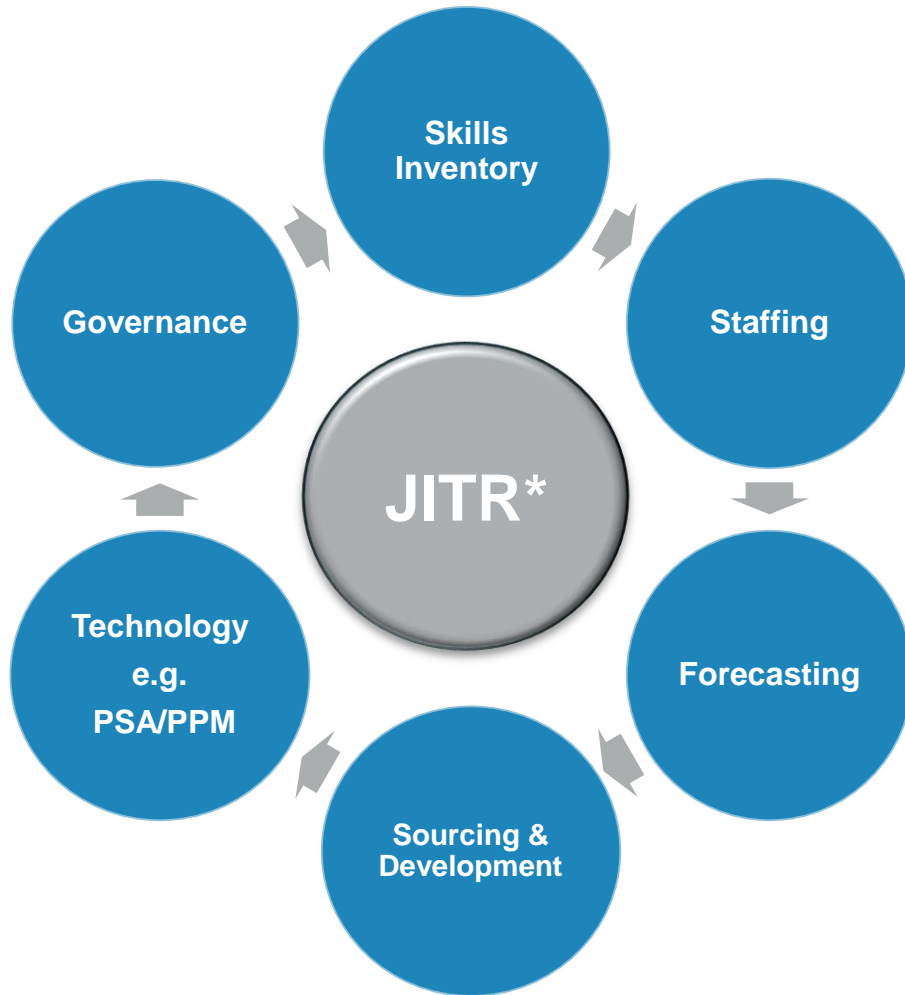
# **Data Management Best Practices for Resource Management**

# Session Abstract

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Since inception the RMI has advised its' members regarding the data intensive nature of an effective resource management function. Because labor cost is roughly three quarters of the total cost of running a project-based service business, data collection, analysis and reporting are essential to investments in human capital. During this highly informative Power UP, we will discuss best practices for data collection, data usage, and creation of strategic advantage from data used to drive your resource management processes and technology.

# Perspectives on Data Management for RM



\*Just-in-Time Resourcing®

**Walking around the JITR wheel, there is data needed in each element**

➤ **Four questions:**

1. What outputs do I need to run the day to day operation and therefore what data inputs are required?
2. What outputs would I like to have from the data I am collecting, but not getting?
3. What outputs would I like that I am not collecting data for and how should I go about that?
4. How do I ensure integrity of the data and avoid duplicate entry of data?

# Digital Transformation is a Journey (from 2Q/2021 Power UP)



## Status Quo

- Primary focus on T&E + Invoicing
- Heavy use of Excel
- Low level of integration
- Bespoke solutions



## Automated

- Use of PSA/PPM as “ERP of services”
- Higher degree of integration
- Use of transactional data to drive better decision-making



## Transformed

- Transformed Business Processes
- Customer and business partner collaboration
- Use of AI and advanced BI/Analytics for decision-making

## RMI Research

- ~30% companies in RMI survey not using automation tools for RM
- For those that are, 1/3 are not happy and 70% are still using spreadsheets
- 60% respondents want better reporting and analytics

# Better Transactional Data (from 2Q/2021 Power UP)

As companies move from status quo to automated, there are some basic capabilities that should be enabled by your RM Automation solution

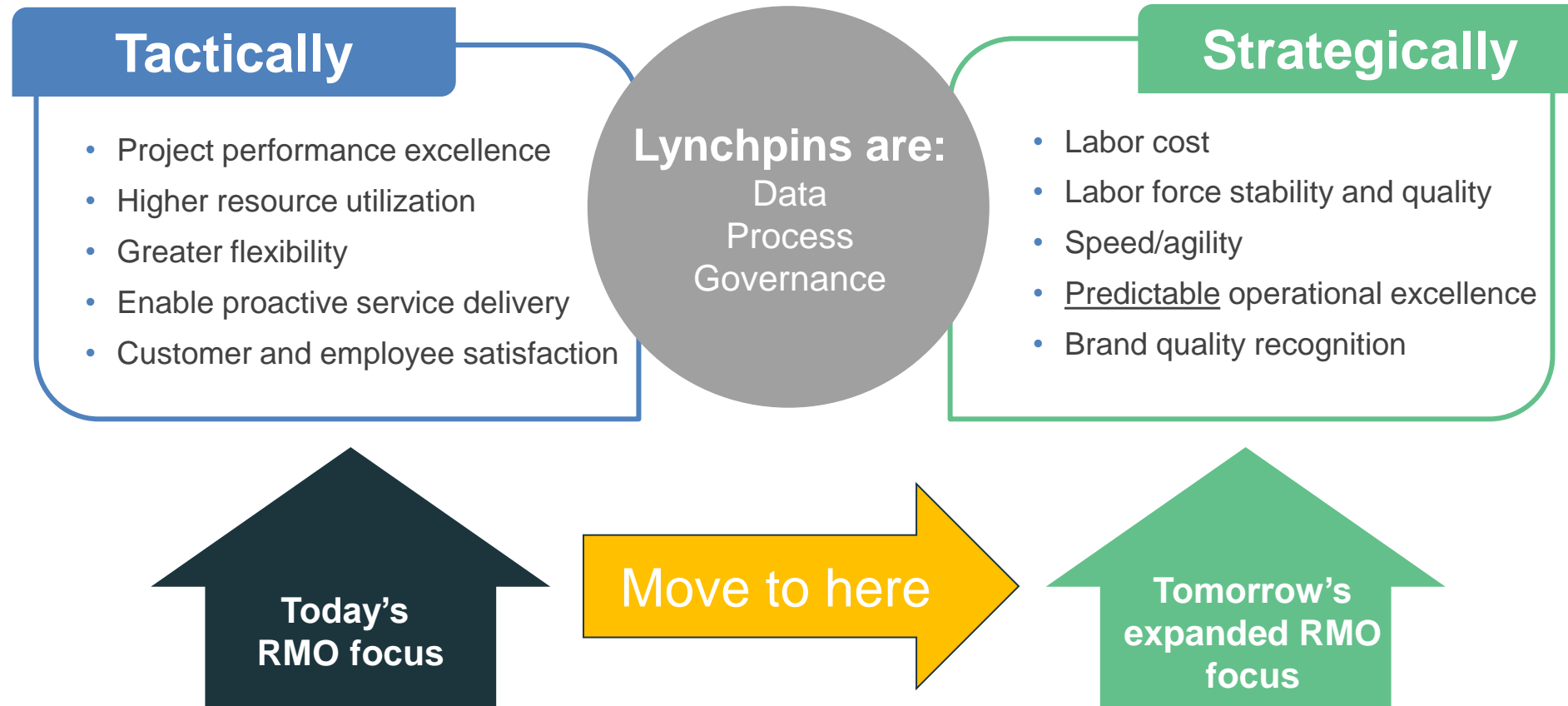
- Skills Management
- Supply and demand matching
- Resourcing before project is sold
- Capacity Management and Forecasting
- Project Team Modelling

What data and reporting capabilities will you need for these 5 critical needs?



# Extracting Strategic Value From Data

RESOURCE MANAGEMENT CAN ENABLE MANY COMPETITIVE ADVANTAGES:





# Desired Strategic Outcomes

## Desired Outcomes

Improved project portfolio performance

Lower labor cost per hour

Improved utilization

High forecast accuracy

Employee retention of the right people

Customer satisfaction (portfolio delivery/quality)

## Data Needed

Skills type

Experience level

Proper project capacity

Location (city, country, geo)

Travel required

Contractor or other third party?

## And data related to...

Forecast accuracy

Employee attrition

Customer satisfaction

**For every project collect and store data to optimize the key cost drivers**

# Data Management Best Practices for RM

**Building  
strategic RM  
capabilities  
begins with  
good data  
management  
practices**

It's all about DATA! - Capture, correlation, analysis

Putting data to work – PSA / PPM / BI / AI

Analyst capability in the RMO

Systems integration (to minimize redundant data)

Ensure integrity (accuracy) and timeliness of data

# Data Management Perspectives from ServiceNow

# Guest Speaker

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## **Chris Nakovics**

### **Global Resource Management Leader, ServiceNow**

Chris Nakovics is the Customer Outcomes Global Resource Management Leader at ServiceNow, responsible for strategic resource management, business process operations and shared services. Chris has more than 15 years of expertise focused on advancing the discipline of resource management, implementing partner frameworks, enhancing and accelerating skills development, as well as, continuous process improvements. Chris holds an MBA in Information Systems Management from Dowling College and a BBA from Hofstra University, along with his RMCP® certification.



# About ServiceNow

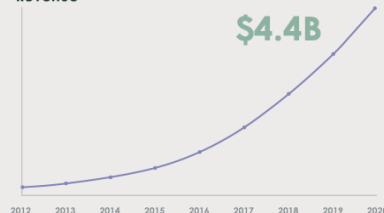
## ServiceNow: Platform for Digital Business

Our company<sup>(1)</sup>

**2004**  
Year founded

**~14,000**  
Global employees

Revenue



Revenue growth

**33%**

Year-over-year subscription  
revenue growth

Global partners

**1,500+**



Our customers<sup>(2)</sup>

**~80%**  
of Fortune 500

**97%**  
Renewal rate

**~6,900**

Global enterprise customers



FORTUNE  
WORLD'S MOST  
ADMIRABLE  
COMPANIES

STANDARD  
& POOR'S 500

FORTUNE  
500  
2020

Great  
Place  
To  
Work.  
Certified  
2020-2021

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## Our culture and values are core to how we operate

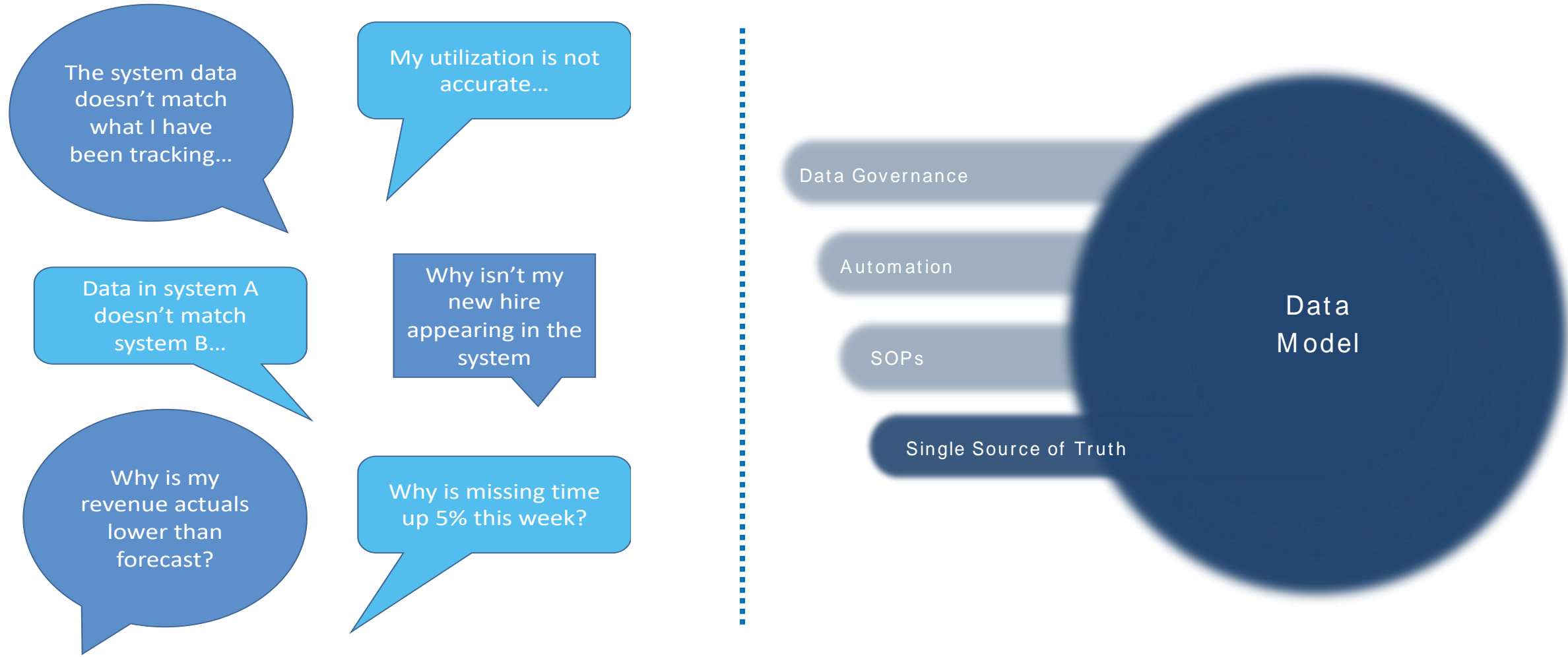


# Data Management & Business Interlock



1. Data Model
2. Role & Responsibilities
3. Data in Practice
4. Business & Objectives
5. Prioritization
6. Create a Plan

# Data Integrity & Business Approach



# Through a Professional Services Lens...



Sales  
Consultant/Project Mgr  
Data Entry Accuracy &  
Maintenance

Resource Management  
Data Management,  
Governance & Insights

Business Leadership  
Data Consumption &  
Decision Making

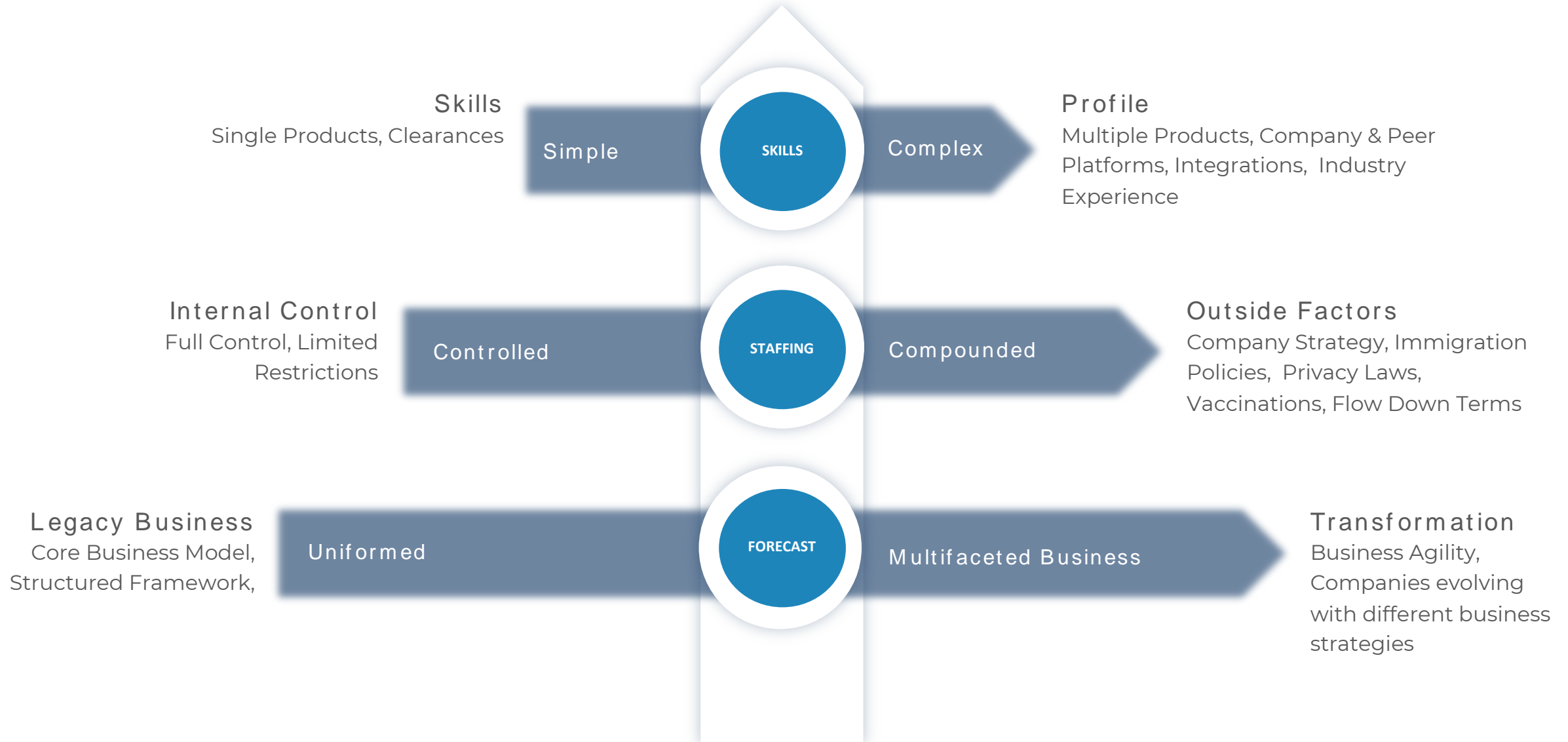
**Pipe Line, Skills,  
Profiles & Schedules**

**Staffing, Forecasting &  
Capacity Planning**

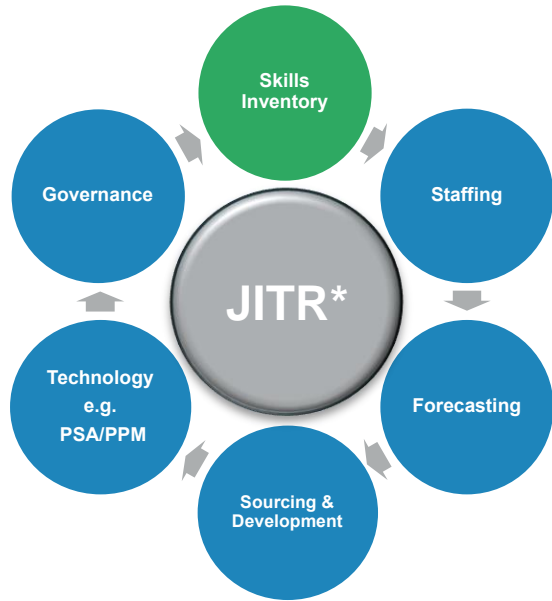
**HC Planning *Aligned to*  
Shifts in Demand**



# Business Maturity & Data Complexity



# Skills Management is critical for Effective Resource Mgmt



Just-in-Time Resourcing® (JITR)

## WHAT

1. Business & Objectives
2. Define Priorities
3. Create a Plan

## WHY

Profile Complexity  
Multiple Business Models  
Cross Training  
Professional Development  
Career Progression

## HOW

One System  
One Process  
Enablement  
Data Maintenance & Management  
Governance  
Actionable Data through Analytics

# RMI Upcoming Events

# Resource Management Certified Professional (RMCP)®

First-of-its-kind certified  
professional skills  
development program for:  
**Resource Managers**

Learn Best  
Practices

Gain Access  
to RMCP®  
Resource  
Center

Collaborate  
with Industry  
Peers

*Plus a copy of a robust commercial-grade  
resource management process*

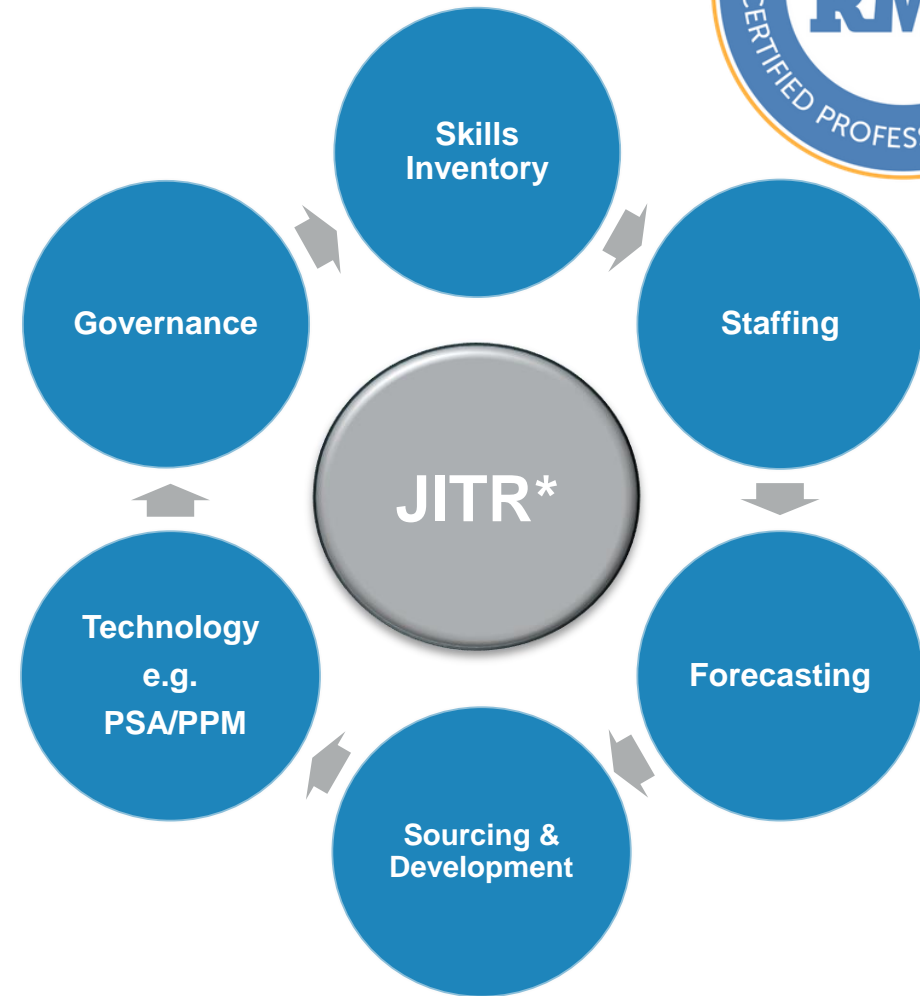


# RMCP® Overview



- Prerequisite study
- 3-day classroom, 6-week online instructor led sessions (2 hrs. each), and on-demand format
- Interactive lectures, case study workshops
- Certification exam
- Re-certification process

- Pricing\*:
  - \$1,995/person in-class
  - \$1,895/person online
  - \$1,795/person on-demand
- Student pays travel expenses
- Materials and testing fee included



Just-in-Time Resourcing® (JITR)

\*Price subject to change. Volume pricing available upon request.

# Upcoming RMCP® Programs

## In-Person RMCP

- **February 22-24, 2022 (Cincinnati, OH)**  
\$1,895 now through January 22, 2022  
\$1,995 after January 22, 2022
- **April 25-27, 2022 (Dallas, TX)**  
\$1,895 now through March 25, 2022  
\$1,995 after March 25, 2022



## Online RMCP

- **starts February 2, 2022**  
\$1,795 now through January 2, 2022  
\$1,895 after January 2, 2022
- **starts May 25, 2022**  
\$1,795 now through April 25, 2022  
\$1,895 after April 25, 2022



## ADVANCED RM COURSE

- **April 27, 2022 (Dallas, TX)**  
\$799 (offered exclusively to RMCPs)



**RMCP® ON-DEMAND VERSION AVAILABLE 7 X 24 FOR \$1,795**

**RMGS Bundled Pricing available (see website for details)**

Apply today at:

<http://resourceinstitute.com/apply/>

# Third Annual Resource Management Global Symposium

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**April 28-29, 2022: Dallas, TX**  
**‘Future Proofing Resource Management’**



**Learn. Collaborate. Innovate.**

[www.resourcemanagementinstitute.com/symposium](http://www.resourcemanagementinstitute.com/symposium)

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Keyedin enables project portfolio management professionals to be more strategic, efficient and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic, real-time PPM analytics. To learn how Keyedin may enable you to turn your PMO into a strategic value driver for your business - visit [www.keyedin.com](http://www.keyedin.com) for more information.



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# Q&A

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