



Power UP

Five Things Your PSA/PPM Tool Should Do to Support Your Resource Management Needs

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Five Things Your PSA/PPM Tool Should Do to Support Your Resource Management Needs

Digital Transformation is a journey



Status Quo

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



Automated

- Use of PSA 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

5 things your PSA/PPM should do to support RM

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

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



Skills Management

Staffing purely based on role is not good enough;
More often than not, the customer is looking for a specific skill or set of skills

- Match supply and demand based on skills
- Should see where the criteria is met and where it's not – best fit ideal
- Skills inventory that includes ratings, certifications and other resource requirements such as visas, security clearances, etc.
- Skills inventory now being used more to incorporate elements supporting improved employee engagement e.g. career interests, project preferences
- Support a process for keeping skills up to date



Supply and Demand Matching

At its core, every PSA/PPM solution should have the ability to easily match the demand with supply to assign a resource to a project

- Manage/organize a queue of staffing requests
- Search and staff in the same tool with minimal clicks
- Filter and/or search for people based on various criteria such as role, skills, cost rate, location, etc.
- Include 3rd Party resources in search
- Support employee engagement goals in concert with utilization objectives



* Advanced or AI features might include auto assignment based on fit and/or optimizing an entire team based on weighted criteria

Resourcing before the project is sold

Visibility into the impending demand can help better support the staffing process, drive better utilization and improve client satisfaction

- Soft book resources earlier in the process
- Requires integration with CRM / strategic planning
- View of resource pool should indicate soft vs hard booked resources
- Better management of peaks and valleys by enabling more proactive actions for resource balancing



Capacity Management and Forecasting

Managing the supply and the demand of resources is a strategic function. The PSA/PPM solution should support this process with all relevant information

- View into supply and demand preferably 6 months out
- Bottoms up view so you can see and manage peaks and valleys
- Dynamic view to filter by various criteria such as role, location, P&L unit, etc.
- Resource schedules drive time, cost and revenue forecasts



Project Team Modelling

An important feature for a PSA/PPM solution is to model various staffing scenarios to see the impact on resources and project margins before a project is started

- Construct or model various scenarios or project teams
- View in real-time the impact on project margins and utilization as various things change such as resources, roles, rates, etc.
- Dynamic master resource schedule / “console” to see the entire organization or parts of the organization



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Strategy



Deployment



Adoption & Optimization



<https://www.rtmconsulting.net/ps-digital/>

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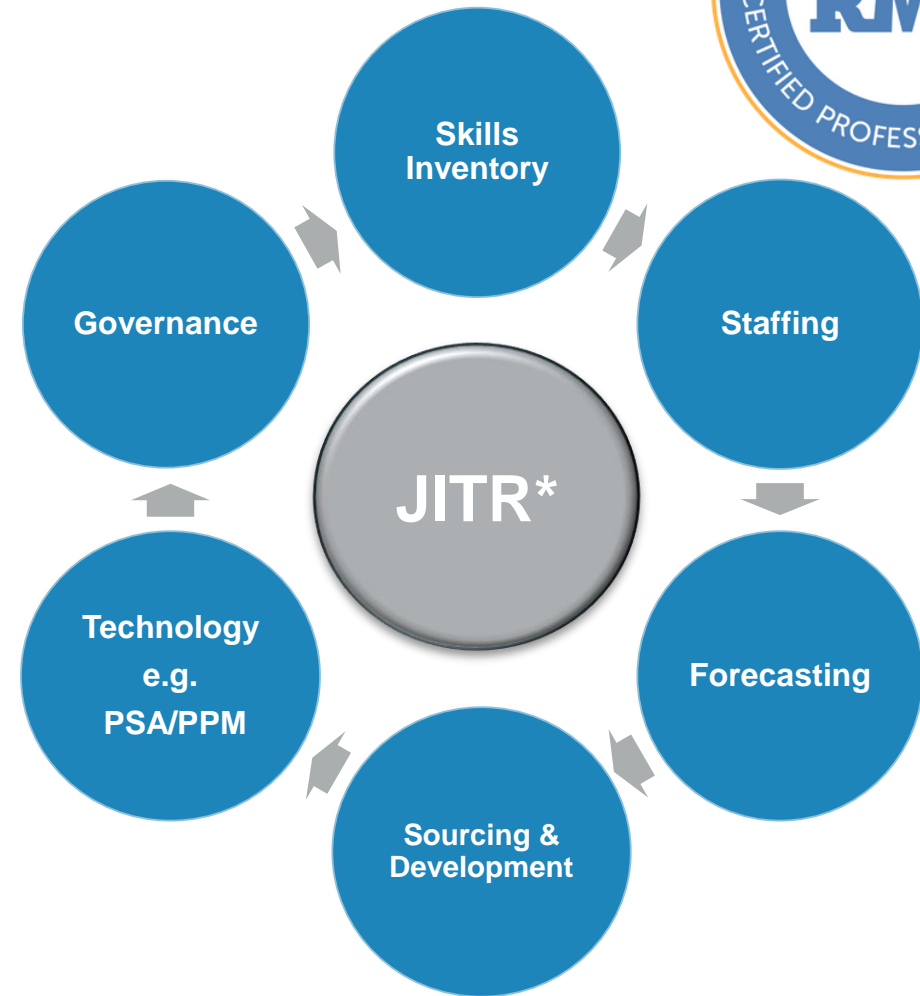


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Q&A

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