

Advancing Maturity in Resource Management from Level 1 to 3

Overview

This in-depth, two-day workshop is designed for professional services organizations using Certinia PSA who are ready to mature their resource management capability from unstructured, ad hoc practices (Level 1) to a defined, repeatable, and controlled model (Level 3).

Through expert facilitation, collaborative exercises, and use of proprietary tools and templates, participants will create a clear roadmap for evolving their resource planning, ownership models, and operational KPIs—fully supported by Certinia PSA functionality

Duration

- 2 Days
- Total instruction time: 12 hours

Location

- On-Site or Remote

Target Audience

- Professional Services Leaders
- Resource Managers
- Project and Delivery Managers
- PMO Professionals
- Change Management Stakeholders

Prerequisites

Participants should have:

- A basic understanding of Certinia PSA Resource Management functionality
- Access to current resource management processes and configurations
- Familiarity with their organization's staffing workflows, roles, and data management
- A cross-functional team including operations, delivery, and PSA system admins is recommended for full benefit

Learning Objectives

By the end of the workshop, participants will have collaborated on:

- An evaluation of their current resource management maturity
- Mapping existing and future-state resource processes
- Defining process ownership structures using RACI models
- Identifying and tracking performance using operational KPIs such as tracking current and forecasted resource capacity against project demand and optimizing future allocations based on planned versus actuals
- Documenting high-impact changes as use cases
- Building a prioritized implementation and change adoption roadmap
- Planning for needed Certinia PSA features and data clean-up

Workshop Assets and Deliverables

Assets:

- Process maturity model (levels 1-3)
- Inventory of As-Is Processes - Template
- Use Case To-Be Processes - Template
- KPI - Template
- Backlog – Template

Deliverables:

- Maturity Model Reference Guide
- As-Is and To-Be Process Mappings
- RACI and Role Assignments
- KPI and Metrics Tracker
- Prioritized Implementation & Change Backlog

Workshop Agenda

DAY ONE: Foundation and Process Design

- Session 1: Introduction to the Resource Management Maturity Model
 - Welcome and Objectives
 - Overview of Maturity Levels 1–3
 - Characteristics of current challenges and desired future state
- Session 2: Process Identification & Mapping
 - Group Discussion: Current pain points with time capture, approval, and reporting
 - Process Mapping:
 - Map “As-Is” practices (e.g., Resource requests not used, assignments created based on availability only, no pipeline of resource demands)
 - Align “To-Be” processes with Level 2-3 capabilities, such as:
 - RM_CAP_2.0.1 Demand for Resources known prior to Project creation.
 - RM_CAP_2.0.2 Required skills and certifications of Resources to be staffed to Project enable immediate identification of Resources who are qualified for the Project.
 - RM_CAP_2.0.3 Resource availability known for upcoming MONTHS so that availability for staffing to a Project is known down to the MONTH level.
 - RM_CAP_2.0.4 Resource historical utilization AND scheduled utilization calculated.
 - RM_CAP_3.0.1 Staffing Managers can make decisions to staff a Project based on the priority of the Project.
 - RM_CAP_3.0.2 Resource held or assigned to Project has the highest level of matching criteria.
 - RM_CAP_3.0.3 Time to staffing from Ready to Staff and Assigned decreased to accepted time frame.
 - RM_CAP_3.0.4 Assignment and Project Estimates At Completion (EAC) are calculated, and variances are managed at a MONTHLY level by the Project Manager within organizationally accepted ranges
 - RM_CAP_3.0.5 Resources self-assess against Skills and Certifications to increase Skill Request to staffed Resource matching.
 - RM_CAP_3.0.6 Time and expense are managed at BOTH an overall Project and Milestone level.
- Session 3: Roles, Responsibilities & Accountability
 - Assign process ownership across functional teams

- o Develop RACI Matrix for key activities:
 - Skill and certification rating management
 - Resource request creation
 - Resource request staffing (assignment creation)
 - Utilization management and schedule updates
- o Define governance for process adherence and updates

DAY TWO: Metrics, Tools, and Execution Planning

- Session 4: Key Metrics & Feedback Loops
 - o Define KPIs across compliance and performance:
 - RM_KPI_1 Resource Utilization Rate: Measures the percentage of billable versus available hours, highlighting both over and under-utilization.
 - RM_KPI_2 Capacity vs. Demand: Tracks current and forecasted resource capacity against project demand, including breakdowns by Skill, Role, Region, Practice, or Group.
 - RM_KPI_3 Skills Availability: Assesses alignment of resource skillsets with project requirements and identifies gaps for up-skilling or hiring.
 - RM_KPI_4 Scheduled vs. Actual Hours: Compares planned hours to actual hours worked, identifying variances and optimizing future allocations.
 - RM_KPI_5 Skills Assignment Accuracy: Evaluates the percentage of project assignments where required skills match the assigned resource's actual skill set, reducing misallocation and project risk
 - RM_KPI_6 Resource Availability by Skill: Provides real-time visibility into which resources with specific skills are available for assignment, aiding in rapid staffing decisions
 - o Design feedback loops: weekly compliance reports, system-generated reminders, manager dashboards
 - o Align metrics with business goals
- Session 5: Implementation Roadmap & Use Case Definition
 - o Group activity: Rank process changes by impact and feasibility
 - o Document use cases for key changes and Certinia configuration
 - o Identify required data clean-up or migration tasks
- Session 6: Closing & Next Steps
 - o Review all use cases and secure alignment
 - o Develop a prioritized feature and data backlog
 - o Define post-workshop action items and success checkpoints