Advancing Maturity in Time Management from Level 1 to 3

Workshop Overview

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

Participants will analyze their current maturity, design future-state processes, and leverage Certinia PSA functionality to implement improvements that drive accuracy, compliance, billing timeliness, and utilization transparency.

Duration

- 2 Days (6 hours per day)
- Total Instruction Time: 12 hours

Location

- On-Site or Remote

Target Audience

- Professional Services Leaders
- Project Managers
- Time Approvers and Functional Managers
- PSA Administrators
- Finance & Billing Teams

Prerequisites

Participants should have:

- A foundational understanding of Certinia PSA Time Management functionality
- Familiarity with current time entry and approval workflows
- Visibility into compliance requirements

- A cross-functional team (delivery, finance, operations) is recommended for full alignment

Learning Objectives

By the end of this workshop, participants will:

- Evaluate current time management maturity
- Identify and document core "As-Is" and "To-Be" time processes
- Define roles and responsibilities using RACI models
- Establish KPIs such as Time Entry Compliance, Utilization, and Approval Timeliness
- Build a roadmap for configuration, change management, and feature adoption
- Document time management use cases to support implementation and governance

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: Foundations and Future-State Design

- Session 1: Introduction to Time Management Maturity
    - Welcome and Workshop Objectives
    - Overview of Time Management Maturity Model Levels 1–3
    - Discussion: Challenges of L1 (e.g., auto-approved time, billing lag) vs. Goals of L3 (e.g., compliance tracking, approval workflows)
- Session 2: Process Identification & Mapping
    - Group Discussion: Current pain points with time capture, approval, and reporting
    - Process Mapping:
        - Map "As-Is" practices (e.g., auto-approval, minimal review, billing corrections)
        - Align "To-Be" processes with Level 2–3 capabilities, such as:
            - TM_CAP_3.0.1 Non-billable project timecards are reviewed by the resource's functional manager and approved/rejected
            - TM_CAP_3.0.2 Time is required against milestones on fixed fee projects to enable planned vs actual hours tracking
            - TM_CAP_3.0.3 Resources are reminded to submit timecards each week
            - TM_CAP_3.0.4 All resources with missing timecards are notified and missing timecards are managed until time is submitted
            - TM_CAP_3.0.5 Utilization time actuals are monitored
            - TM_CAP_3.0.6 Editing of approved timecards controlled by billing team

        -----INCLUDES:
            - TM_CAP_2.0.1 Customer project time reviewed by project manager and approved/rejected
            - TM_CAP_2.0.2 Timecards for customer projects require an assignment of resource with a bill rate and cost rate
            - TM_CAP_2.0.3 All resources with missing timecards are notified
- Session 3: Roles, Responsibilities & Accountability
    - Assign accountability for time processes (PMs, FMs, Billing, Admins)
    - Develop RACI Matrix for key activities:

    - Time entry reminders
    - Approval workflows
    - Escalation paths for missing time
    - Editing of approved timecards
  - Define governance for process adherence and updates

DAY TWO: Metrics, Systems, and Implementation Planning

- Session 4: Metrics & Feedback Loops
  - Define KPIs across compliance, performance, and billing:
    - TM_KPI_1 Actual Hours Logged: Total number of hours recorded by resources against projects or tasks, supporting accurate project costing and billing
    - TM_KPI_2 Scheduled vs. Actual Hours: Compares planned (scheduled) hours to the actual hours logged, helping identify variances and potential scheduling or estimation issues
    - TM_KPI_3 Time Entry Compliance Rate: Percentage of timecards submitted and approved on time, ensuring timely billing and project reporting
    - TM_KPI_4 Utilization Rate: Measures the proportion of available hours that are billable or productive
    - TM_KPI_5 Hour Variance Percentage: Tracks the difference between scheduled and actual hours as a percentage, highlighting projects or resources at risk of overruns or underutilization
    - TM_KPI_6 Unbilled Hours: Total number of hours worked but not yet billed, helping to prevent revenue leakage and ensure all work is invoiced
    - TM_KPI_7 Time to Approve Timecards: Average duration between time entry submission and approval, reflecting process efficiency and potential bottlenecks
    - TM_KPI_8 Billable vs. Non-Billable Hours: Breakdown of hours worked that are billable to clients versus internal or non-billable activities, supporting profitability analysis
    - TM_KPI_9 Resource Availability: Real-time view of remaining or available hours for resources, supporting optimal allocation and workload balancing
    - TM_KPI_10 Project or Task Completion Rate (Time-Based): Percentage of tasks or milestones completed on schedule, indicating time management effectiveness at the project level
  - Design feedback loops: weekly compliance reports, system-generated reminders, manager dashboards
  - Align metrics with business goals

- Session 5: Implementation Roadmap & Use Case Definition
    - Group exercise: Prioritize process and system improvements using impact vs. effort
    - Draft use cases for each key process improvement
    - Identify required data clean-up or migration tasks
- Session 6: Closing & Next Steps
    - Review use cases and secure stakeholder alignment
    - Develop a prioritized feature and data backlog
    - Confirm next steps for enablement, training, and backlog execution
    - Assign post-workshop owners for follow-through and adoption