



**Best Practice Guide**  
**Five Steps to Proactive**  
**Resource Management**

# As services organizations grow, resource management becomes increasingly complex.

Matching supply and demand is tough when timescales, progress, and availability are constantly changing. It's this flux which makes resource management for many organizations too reactive.

"Where is each of our consultants this week? How busy are they on billable work? Who are the next ones due to come off projects? What is the future demand by role, capability, or seniority? How confident can we be that this new business will begin when it is scheduled? Who do we have that is ideal for that work?"

Financially critical questions like how to maximize utilization and project margins can be hard to answer because of the sheer number of variables and the amount of data-sifting that is required.

In the past, cumbersome manual processes and silos between teams that had valuable resourcing inputs made it difficult to get an accurate idea of incoming demand and each resource's utilization rate. This meant resource management was done reactively, close to the start date of projects, and within specific teams or areas.

The future of resource management is one in which resource managers are assisted by technology, such as professional services automation software, to work more proactively and make decisions which positively impact customer satisfaction and business performance.

***In this "Best Practice Guide" guide from Kimble, we describe five simple steps to more proactive resource management.***



# 1 Define demand as early as possible

Share information about potential resource demand coming from both sales opportunities and existing customers.

The only way resourcing managers can fulfill demand coming from existing projects, while also keeping on top of potential demand from new projects, is to have a single view of all demand. A PSA solution, particularly one that links customer relationship management (CRM) with sales and delivery, can be extremely useful in getting this single view of all demand.

First, the sales team is selling the time of the resources, so it is imperative that sales and resourcing teams have an open line of communication. The demand that is coming down the pipeline tells the resource team about upcoming requirements.

The business development staff usually has some idea of the resources required for a project long before a proposal is created. They should be encouraged to enter this into the system as it helps the resourcing team to deliver a better result for the customer. All of those conversations happening between the sales staff at the water cooler — what opportunities they are chasing, when those might start, what skills the engagements may involve — all that should be captured and fed into the system.

Secondly, demand does not come exclusively from new opportunities. Existing projects run on or expand in scope, milestones slip, and extra resources get pulled in. Is there a repeatable business process in place to capture additional demand for resources on projects that are already in progress as soon as that demand arises? If resource managers are allocating people to new projects, it is important that they are aware of the possibility that the end date of a current engagement could change.

*See a single view  
of all demand*





## 2 Assign resources as early as possible

Earmark named resources against work before contracts are complete (once you think it's very likely to happen, verbally committed, say).

Resourcing managers need to understand both what demand is available, as well as what is happening with supply. This can be achieved through a knowledge base that includes the availability, constraints, skills, and location of all the individuals in a company-wide resource pool.

This view enables resourcing managers to softbook named resources against engagements at an early stage. Many companies have a practice of assigning resources for projects once the contractual paperwork has been signed. There is an opportunity to be more proactive here, as deals usually hit a high degree of confidence some weeks before the contracts are finalized, and this time could be used to make progress on resourcing.

Resourcing managers can then plan ahead and build teams that will work well together, finding an optimum balance of more experienced and less experienced members, which both maximizes resource utilization and margin while also training more junior members of the team. This tends to enhance employee engagement as services professionals usually value working in a more planned environment where they can see what projects they are likely to be working on.

That means too that there will be fewer times when there is a last-minute scramble to fill roles from the contractors' market, which typically reduces project margins and increases uncertainty.

Putting together strong teams increases the percentage of engagements which are delivered on time, on budget, and with high levels of customer satisfaction.

*Softbook  
resources  
against  
engagements*

## 3 Break down the silos

Draw on information from all parts of the organization to optimize resource allocation.

When sales, delivery, and resourcing teams work together, the business is more likely to deliver what customers want.

First, resourcing should be done on a global level. In the past, resource management was often siloed within teams or departments, based in a particular area. People's time was often allocated by their manager. Sometimes it was difficult for people in one area of the business to see the availability of people in another area. Unused time may have been locked up within the management structure.

Secondly, with better information on the real availability of consultants coming in from the project managers, resource managers can start to advise the business development team about what resources are opening up.

That means sales managers can concentrate their efforts on areas where there's going to be a readily available resource to support rapid project commencement. If it looks likely, for example, that several resources will hit the bench in two months time without an engagement to move to, the sales team can go out to actively sell that availability. Additionally, there is an opportunity to pull consultants into pre-sales efforts. For instance, experienced consultant John Smith is becoming available for half a day next week — would the business development team like him to go and have a chat with one of their prospects?

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*Focus on the outcomes you are trying to drive*

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*Build and maintain  
high-performing teams*

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## **4** Look for opportunities to recruit

Quantify aggregate demand by role over time so that you can more readily justify recruitment — as recruitment is the method behind growing your business.

Some companies are reluctant to recruit, fearing increased cost and the effort of finding work for a new hire. Approaching growth through this lens is dangerous, however, and the most successful and ambitious companies tend to adopt a positive, but focused approach to recruitment. Rather than seeing recruiting as a burden, consider looking at it as a positive result of a growing business.

Human capital does not materialize overnight. Finding the right person, hiring them, and onboarding them takes time. Hiring is the major way for services organizations — which are essentially selling people's time — to expand. Ideally, new consultants should be brought onboard in a way that means they can be billing as soon as they come through the door, and not causing any drop in utilization.

Using the best available information about what projects are in the pipeline, what the most sought after skills are, and what is the actual availability of resources, means that a quantitative approach can be taken. Weighted demand can be seen coming down the line for more business analysts, say. It is sustained and coming from more than one project, creating a demand-focused and well-justified opportunity to recruit.

Having a proactive approach and being quick to identify the most marketable skills, increases the chances of attracting the very best people available. And even in a tough market, it will be easier to sell the time of high-quality people.

Using technology to remind people to continually log skills and track experience gained fosters a culture of skill and talent development which is rewarded when resources are allocated to the most appropriate projects for their skill sets. These practices help to build and retain a high-performing team.

## 5 Steer towards high-value projects

Put governance in place which ensures that conscious decisions are being made about making the best use of employee time and delivering great value for customers.

Resource planning involves making important choices about which types of work, clients, and projects your business is prioritizing. Having better visibility of supply and demand can increase management's power to make smarter decisions at an earlier stage in the process — in a way that delivers the best outcomes for customers.

You may wish to put more governance in place, or simply have more discussion when making the more strategic choices mentioned above. For instance, a heavily discounted project looks likely to start on a certain date, but a higher value project which would utilize the same people at the standard rate, is showing up a week later. Can the business development team go back to the second client and see if they can bring forward the start date?

Another advantage of a Professional Services Automation solution is its ability to capture opportunities that were lost because the business didn't have the skills to win them. This information is valuable because it allows you to analyze important skill gaps based on what the market demands now, as well as which skills demands are trending. Using trends, you can then determine what skills will be in demand in six months and develop an action plan to address anticipated skill gaps.

A photograph of an ice climber in an orange jacket and helmet, climbing a dark rock face covered in ice. The climber is positioned on the left side of the frame, facing away from the viewer. The background is a vast, white, icy landscape.

*Deliver value  
to customers at  
competitive rates*

## Conclusion

Making the very best possible use of staff time is the goal of resourcing. In some organizations, this process is reactive. But moving to a more proactive approach creates space to optimize the resource management process and to gain control of utilization.

Increasing utilization by one percentage point will increase services profits by one percentage point. So, greater awareness of all of the options for utilizing staff time means being able to steer the firm towards increasing revenue and margin.

But more importantly, it means building strong teams, selecting appropriate engagements, and delivering better outcomes for customers, for employees, and for the business.

## Kimble Best Practice Example – Rule Financial

Rule Financial provided business and technical consulting and IT services to investment banks, asset and wealth management and related financial institutions. The company implemented Kimble PSA and processes that allowed them to align sales and resource management more closely.

Salespeople started to log information earlier about the demand they were seeing and resource managers proactively suggested resources who could help win deals to their colleagues in sales.

They were right: the accuracy of monthly sales forecasts improved to a variance of just 2%, they won more projects, and Rule expanded its operations from 300 to 900 consultants in less than two years. They accomplished all of this despite the complexity of expanding into five more cities in North America and Europe. Rule was eventually acquired by GFT Technologies.

**"Management is doing things right; leadership is doing the right things."** — Peter Drucker

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