RTM Consulting

We help consulting, professional and support services organizations get better at what they do

kimBLe

Successful Strategies for Scaling Your Services Organization

Introductions

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RTM Consulting

Since 2007
Two Locations:
Cincinnati (HQ)
Wash. DC

Management &
Operational
Consulting

Services
Transformation
Experts for Tech
Companies

#1 in Resource
Management:
Just-in-Time
Resourcing®

Innovative
Frameworks and
Transformation
Processes

100+ Years of
Strategy and
Operational
Leadership
Experience

>100 Clients
Worldwide
on 5 Continents

Consulting
Training
Mentoring
Staffing
Software Tools

Rapid Assess ➡ Design ➡ Transform ➡ *RESULTS!*

- Multi-award winning PSA SaaS vendor

- Infused with many years of PS experience

- Designed with CRM & PSA integration at the core

- Facilitates adoption of best practice

- Augmented intelligence at the core
  - Predictive analytics in real time
  - Expert insights and notifications

- Born out of a passion for helping consulting teams grow faster and boost efficiency – meet the challenge of scaling
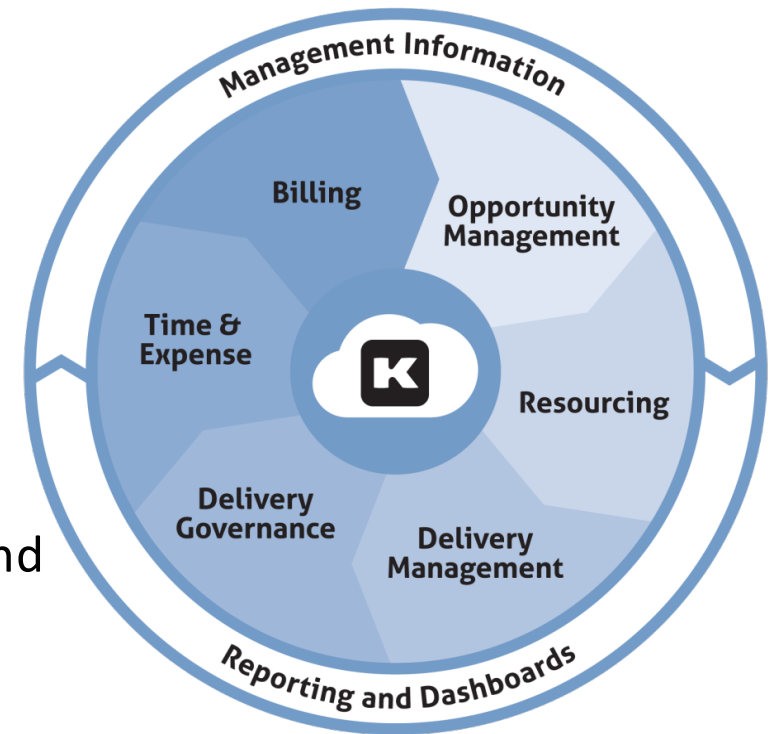
"Since going live with Kimble we have achieved more operational robustness and rigor than we did in the previous 5 years with disparate systems and processes. We are now pushing greater operational rigor and efficiency whilst having more time to focus on the creative activities required to grow our business. Simply put, I love it." CFO, Kimble customer

The challenge of scale

"4% of firms reach 100 consultants, 1% reach 200 consultants"
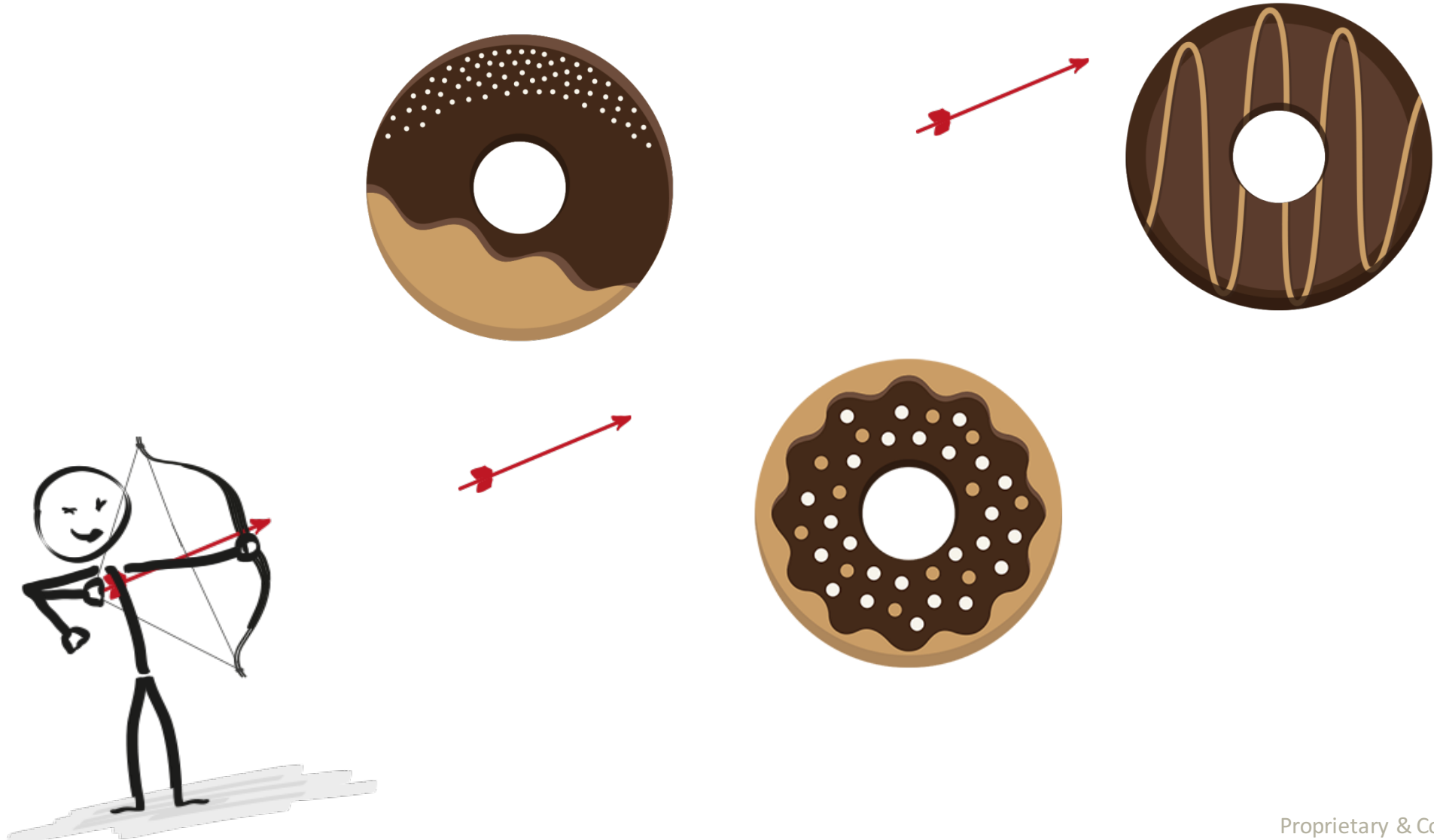
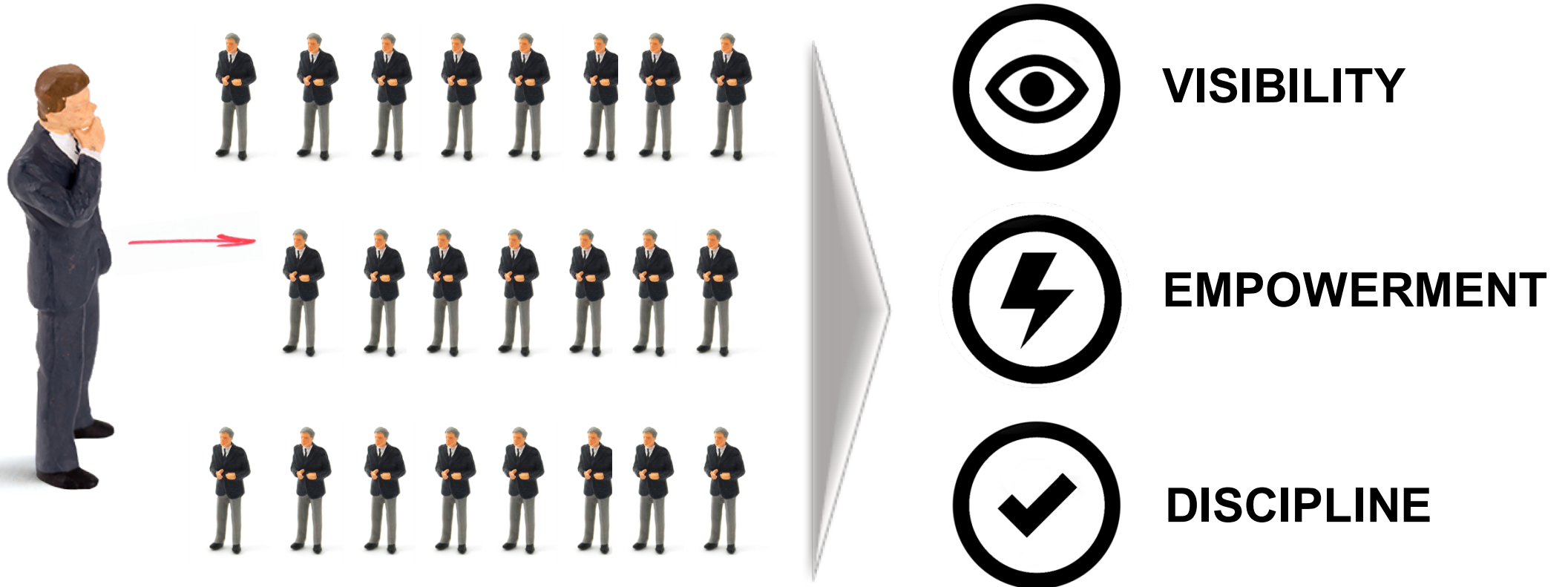Equiteq

This is how many services organizations operate

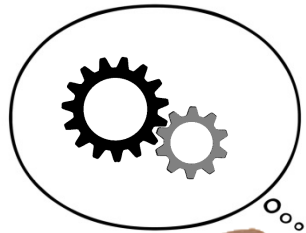*Predictability is key*

Running a services team is complex
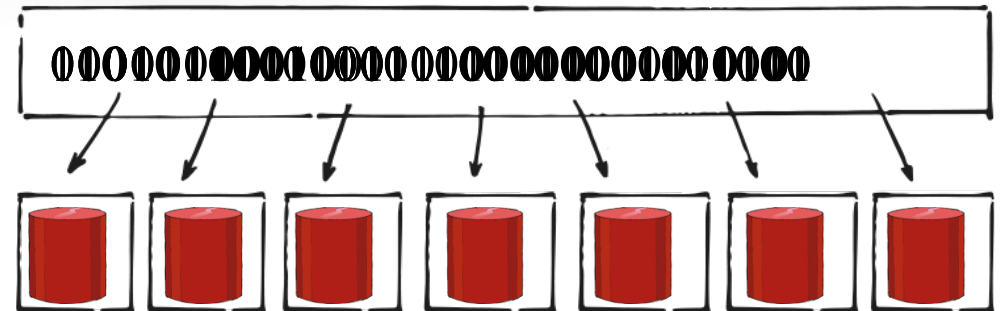
Enablers of scale in a Services team

VISIBILITY

EMPOWERMENT

DISCIPLINE

Visibility

Have information available to experts

Data: the new natural resource

Turning data into decisions…

"Manage with the end in mind"

- Key metrics and measurements are not as useful when viewed historically

- What data do you need to run your business, make decisions and satisfy your customers?

Key Measures

- Revenue Forecasting
- Revenue Backlog
- Resource Forecasting
- Utilization (past & future)
- Project Status (budgets & schedules)

Empowerment

Push accountability and decision making down

Empowerment

- *Push accountability and decision making down*

- *Remove processing delays from the information you use to manage your business*

- *Increase resourcing visibility by defining early and fulfilling early*

- *Find opportunities to recruit*

- *Develop a mechanism for tuning market and skills focus*

- *Enable a consultant's-eye view of their contribution to the firm*

Empowerment:
Establish Span of Control

- Too often, delivery leaders cannot take on more responsibility because they are weighed down by existing work and responsibilities

- A Span of Control Framework defines key parameters and trigger points for scaling the organization

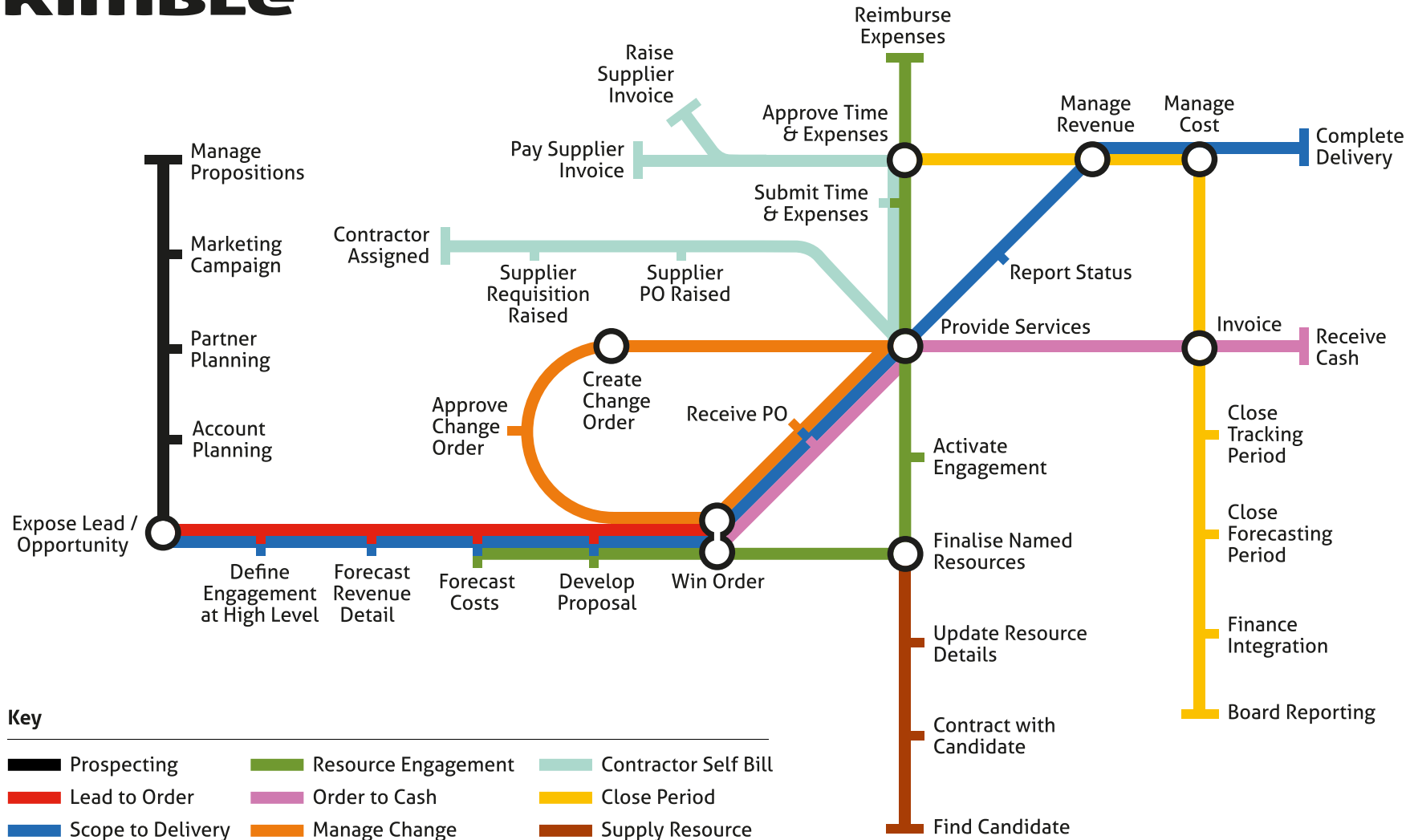| Role	Revenue ($$)	# of Active Clients	# of Active Projects	FTE Direct (Total)
Practice Leader				
Engagement Leader				
Senior Project Manager				

Span of Control is not a set of goals. It defines levels of responsibility one manager can handle. It also indicates when new managers are needed to take on expanding organizational scope.

Discipline
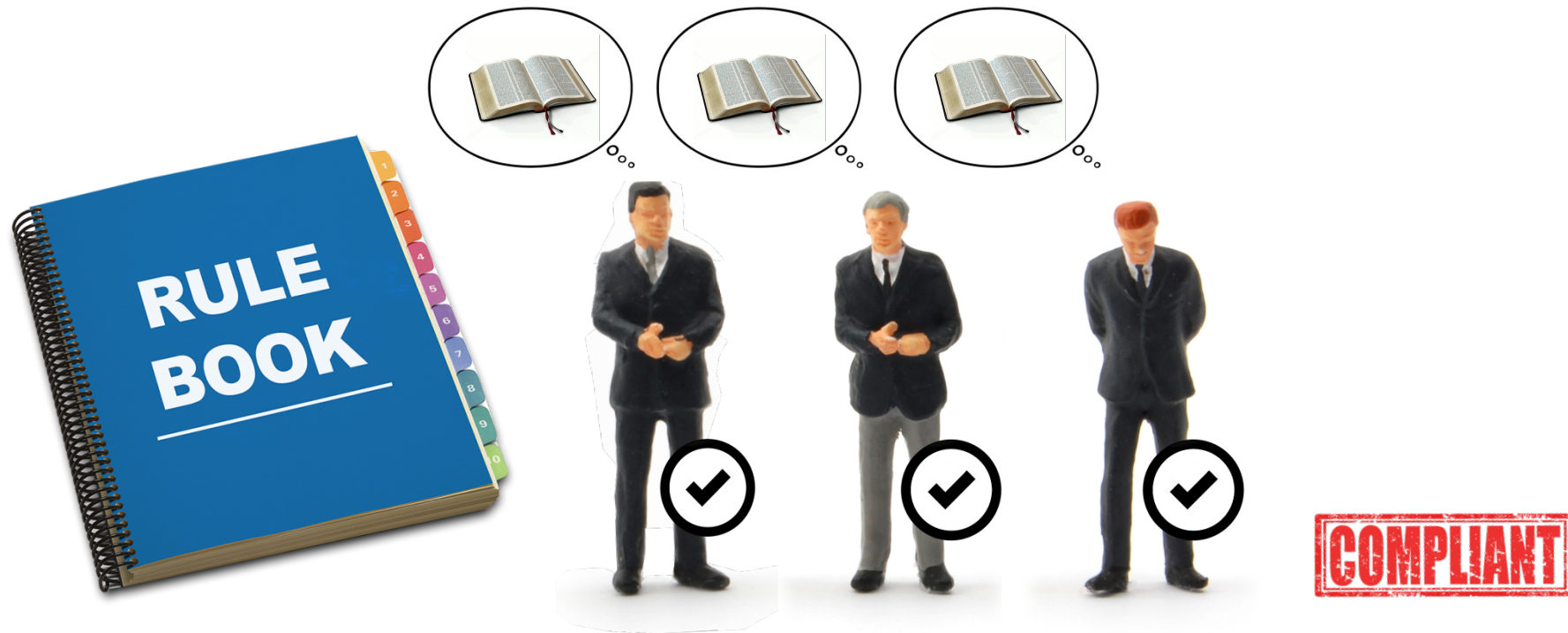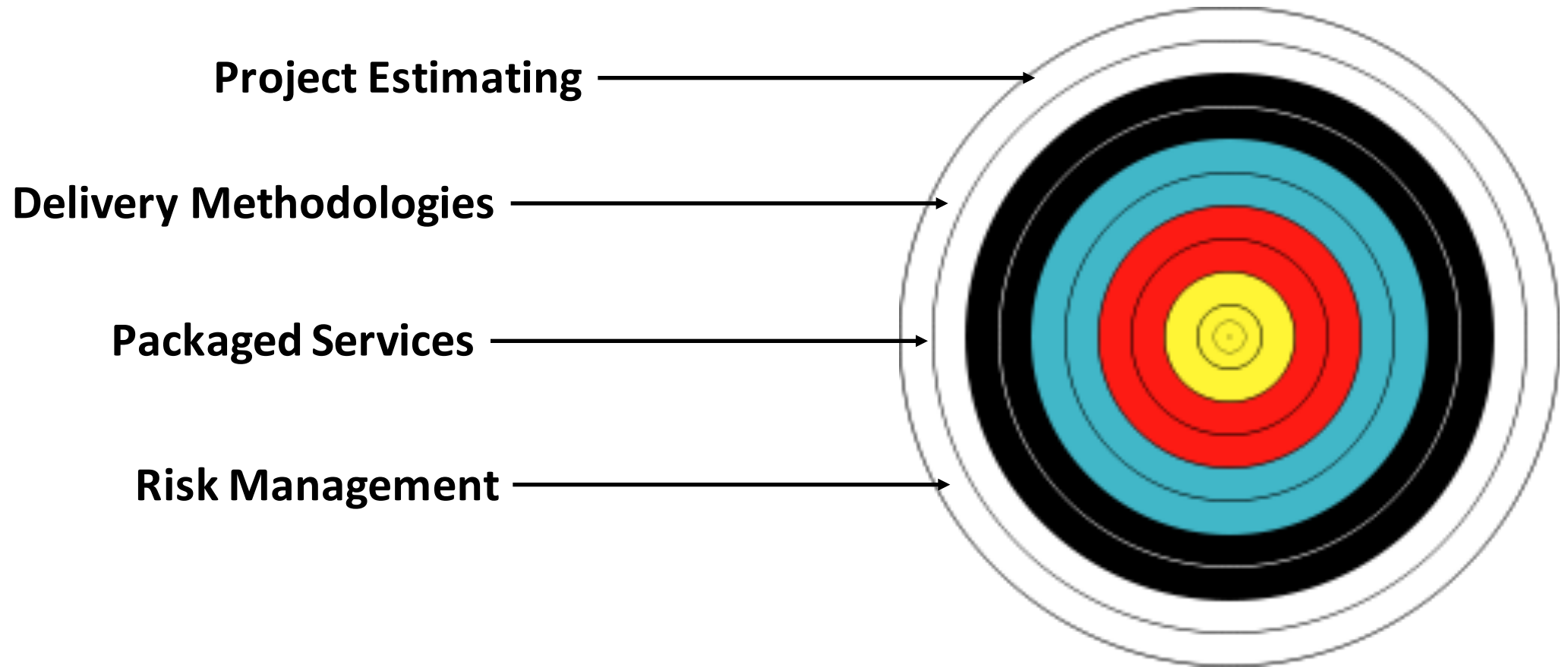

Consistently make the right decisions

Automating the right processes

www.kimbleapps.com

The importance of standardization

Scaling your organization does not have to be linear

Project Estimating ⟶

Delivery Methodologies ⟶

Packaged Services ⟶

Risk Management ⟶

The implication

"for scale"   **"the basics"**

CRM ← **PSA** → ERP

- Adequately plan for future work
- Set the right client expectations
- Align resources with demand

- Capture time
- Measure revenue
- Get invoices out the door

Are you prepared?

- You regularly make decisions with the data you have ✓

- You know the limits of your managers ✓

- You trust your team, but you are still able to verify ✓

- You have adapted your processes to changes and growth ✓

- You are aware of the outcomes you want to drive ✓

- You sufficiently plan and execute to the future ✓

Q&A

Additional Information

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