



Art and Science of The Customer Journey

Why do the majority of PS organizations underperform?

Mark Robinson | Kimble Applications

Marc Lacroix | RTMC

Don't just take our word for it...



Based on data from TSIA surveys majority of organizations underperform

Improving performance: Art v Science



Mark Robinson

“Kimble is a next generation PSA product that helps consulting organizations to scale and achieve their desired outcomes”



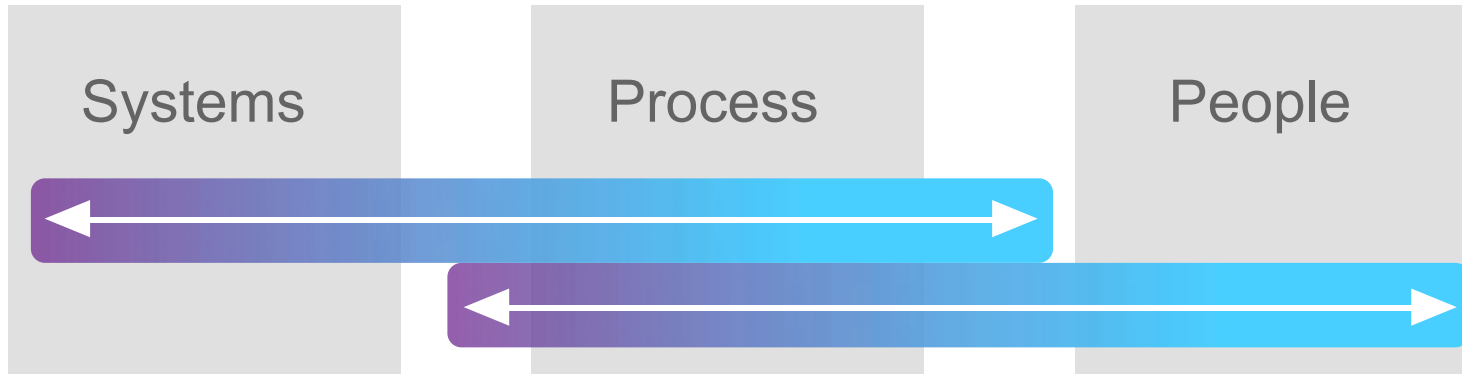
Marc Lacroix

“RTMC helps services organizations get better at what they do”



We Help Services
Organizations Get Better
At What They Do

Improving performance: Art v Science




Why do they underperform?

- ① They try to automate sub-optimal processes
- ② They don't embed basic disciplines
- ③ They look backwards and not forwards
- ④ They make sub-optimal decisions



Art and Science of
The Customer Journey

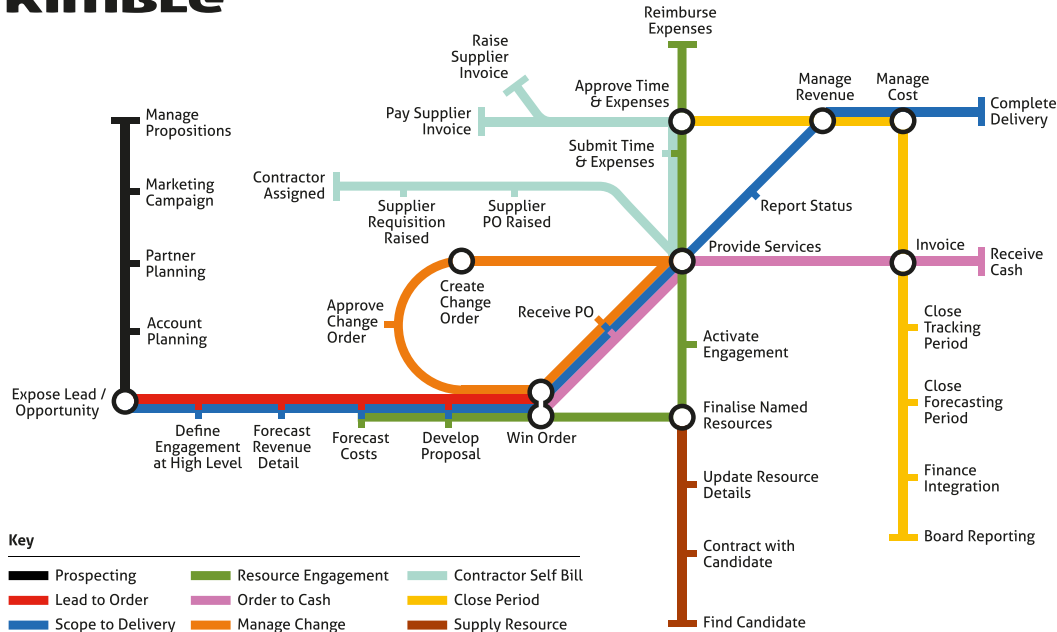
“Optimize processes
before you automate”



How to ensure you have optimal processes

Be honest with yourself	Design with the future in mind	Delivery heroes don't make good process SMEs
Lowest common denominator and not highest common multiple	You are not as unique as you might think	Decide what success looks like. Be prepared to change. Measure.

Leverage best practice process to deliver desired outcomes



Do you want to automate your current processes, or automate the right processes?



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The Customer Journey

“ Firmly embed basic disciplines
– create the metronome ”

Embed basic disciplines

Create a metronome

- Regular cadence of getting data into system
- Create 'muscle memory'
- Daily, weekly, monthly disciplines
- Don't over-complicate, focus on what you do well – be consistent



Focus

able

Focus on what you do well for a repeatable & predictable outcome



Embed basic disciplines

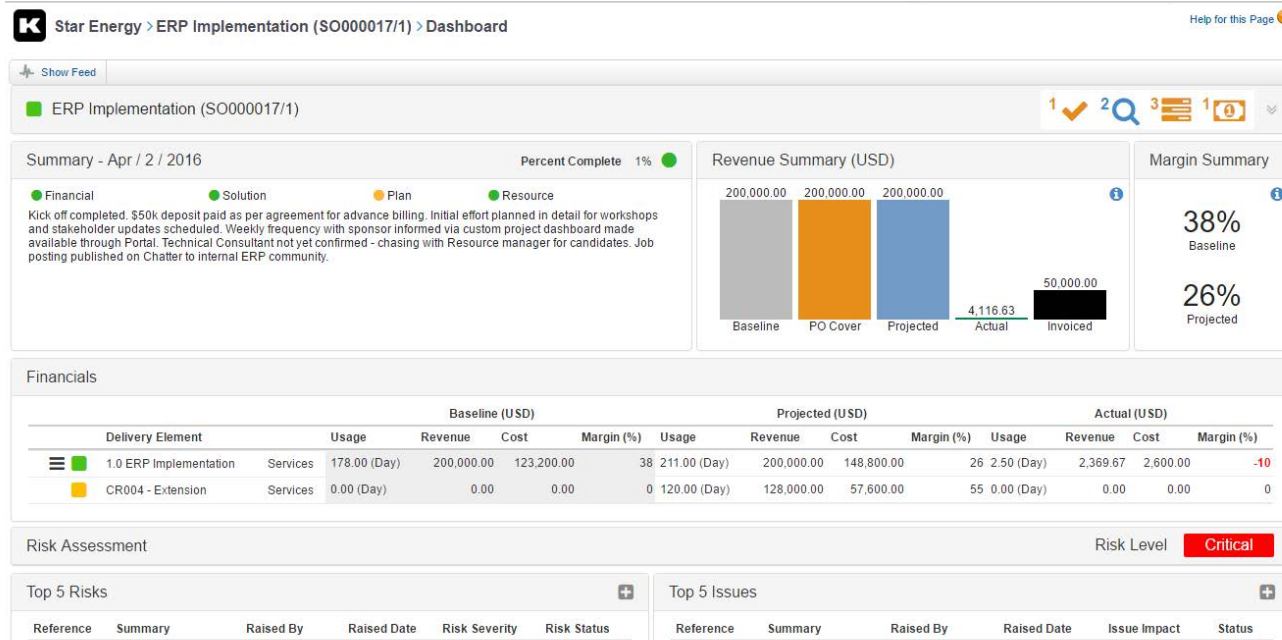
Create a metronome

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Drive the right behaviors

- The power of transparency
- Good is not enough - don't manage down to a target
- Positive v negative enforcement
- Leverage "Nudge" theory

Driving the right (and consistent) behaviors



1

Assignment Capacity Getting Low

2

Start date before Proposal Acceptance date

2

Elements at Usage/Revenue Cap

2

Unresourced Assignments



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“ Focus on the future,
and not the past ”



Forward looking culture

- Natural (and easier) to report on the past
 - Utilization, Project Actuals v. Plan, Financial performance
- Higher reliance on managers. Increases uncertainty.
- Result: Inconsistent performance, especially at scale
- What does it mean to be forward looking?
 - Harnessing sales data is the key
 - Create a ‘living’ resource forecast
 - Revise Estimate at Complete (EAC) weekly
 - Forecast revenue & resources based on actual assignments

Forward looking culture



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

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

Move from KPI versus KRI

Where do you score on the analytics maturity scale?

Descriptive – what happened? (*backward looking*)

Predictive – what could happen? (*forward looking*)

Prescriptive – what should happen? (*nudge*)

Diagnostic – why did/ could it happen? (*causes*)



Revenue

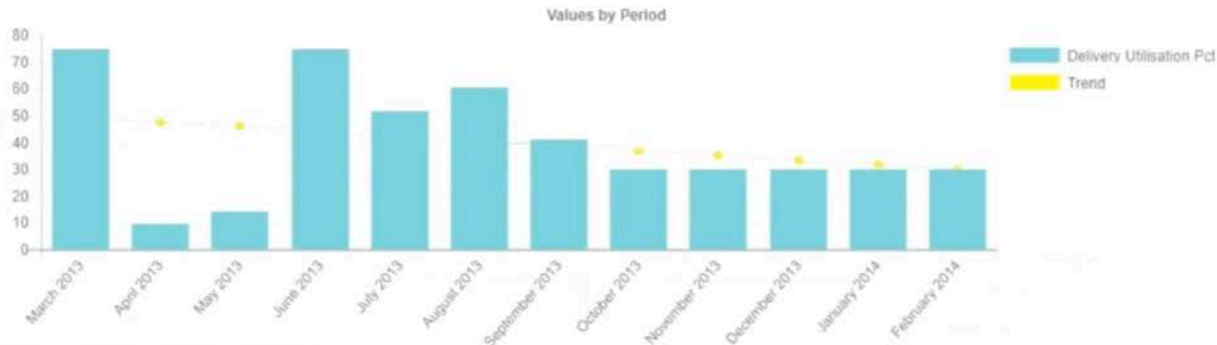
This: GBP 29,845.1
Last: GBP 38,090.2

Revenue has fallen

Delivery U

This: 41.12 (C)
Last: 60.75 [link](#)

Delivery Utili



Impact: -61%

Average Revenue Rate

Impact: 19%

This: GBP 1,728.11 (Change: GBP 235.28)
Last: GBP 1,492.83 [link](#)

Number Of Business Days

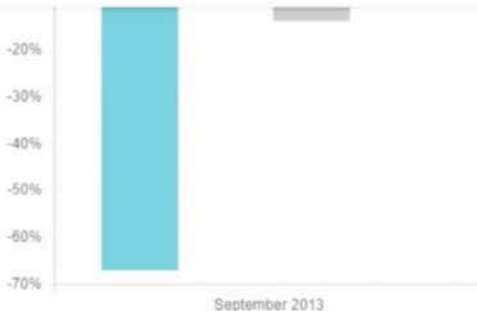
Impact: -14%

This: 20.00 (Change: -2.00)
Last: 22.00 [link](#)

Delivery Resource Count

Impact: 0%

This: 2.00 (Change: .00)
Last: 2.00 [link](#)





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“ Help people to optimize
their decisions and the
decision making process ”



The science of decision making

Daniel Bernoulli – 1738

Expected value = (odds of gain) x (value of gain)

Example:

- Coin toss – heads you win \$10, should you pay \$4 to play?
- $\frac{1}{2} \times \$10 = \$5 \rightarrow > \$4$ play....

Real life examples not so simple

- Overestimate or underestimate odds of success
- Overestimate or underestimate how much we gain

They make sub-optimal decisions

It's easy to interpret data incorrectly

Know what data you need and drive the organization to manage data correctly

Too much time spent processing data and not enough time in decision making

Measure what matters – vital signs



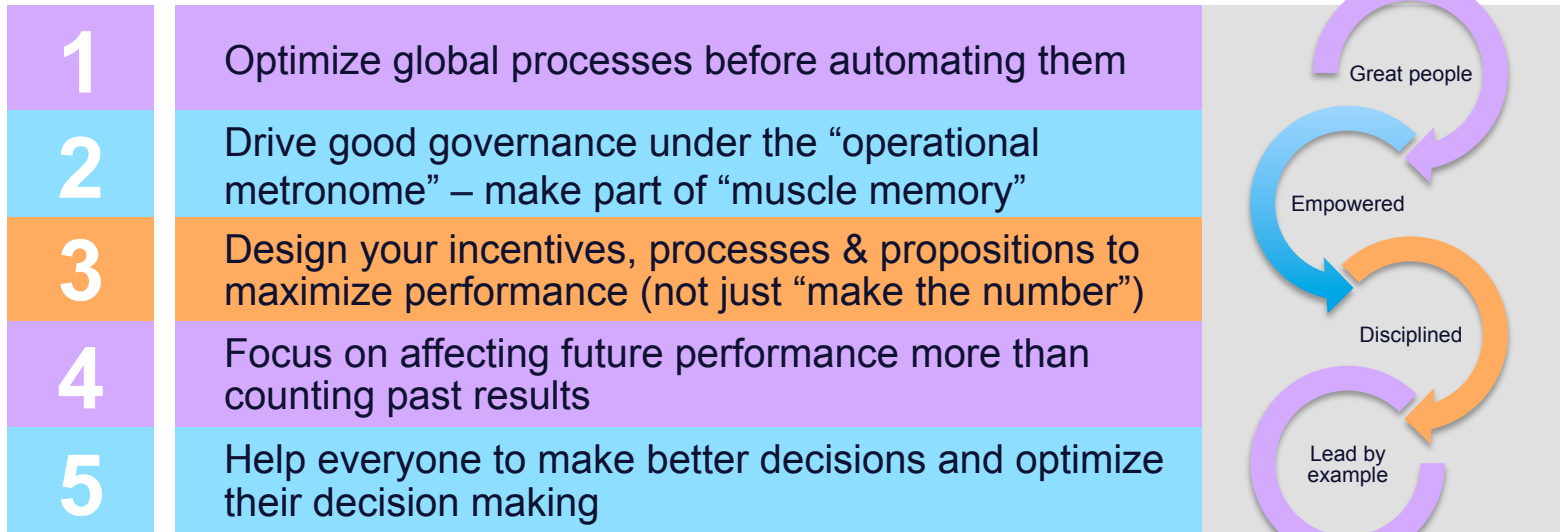


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Summary



Summary – set up to reach your full potential



Being successful does not mean you can't improve

WINTER 18

Questions



KIMBLE
Intelligent Professional Services Automation