RESOURCE MANAGEMENT MATURITY MODEL

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How Mature is Your Resource Management Practice?

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Legend:
- Very Mature (orange)
- Mature (yellow)
- Somewhat Mature (dark navy)
- Somewhat Immature (gray-blue)
- Immature (light blue)
- Very immature (green)

Chart values: 6%, 4%, 45%, 35%, 3%, 7%

- 55% say they have maturity in resource management

- 45% say they are immature in managing resources

How Mature is Your Resource Management Practice?

Now, let's see where you fall on the resource management maturity model. We suggest you do a self-assessment using the criteria on the next page.

Resource Management Maturity Model

	Level 01 Ad-Hoc Or Initial	Level 02 Project By Project	Level 03 Org Wide	Level 04 Data Driven	Level 05 Continue To Improve
People/Training	Minimal training on process or tools – no focus.	Training is project specific on policies and procedures. There is some adhoc tool training.	Enterprise role based training on policies and procedures and tools.	People are trained regularly and certified on skills and tools. Training is a part of the culture.	The enterprise is attracting top talent and providing career paths.
Policies and Procedures	Very basic guidance that is not enforced. The resource management world is the WILD WEST.	Most policies are for a single project. Resourcing procedures are project by project.	Policies and Procedures are enterprise-wide and all in the organization understand the need for a comprehensive resource planning discipline.	The organization is able to use metrics to drive business decisions around hiring and resource usage across the enterprise.	KPIs and Metrics are tightly coupled with organizational goals to continue to advance the success of the business.
Tools/System	Use of spreadsheets and combo of tools (silos).	Using a project based ERP with fully integrated time/resource management. Projects are being resourced with combo of manual and automated operations.	Enterprise use of project based ERP. Resource plans are loaded and the enterprise can see supply and demand.	Enterprise use of project based ERP at an expert level. Role based dashboards and reports are delivered to resource stakeholder real-time.	The ERP is providing all necessary resource management info to everyone in the organization. The tool and its information are part of the fabric of the business.
Culture/Vision	We have always done it this way? Spreadsheets are cheaper to do resource planning on.	Need to improve project performance and resource planning is seen as a way to help improve execution.	Resource Management is a key part of the overall project and org management. All recognize the importance. Operating as a matrix organization.	Resource Management metrics are reviewed daily and the information is reliable and trusted for decision making.	Resource Management is seen as a discipline with a career path. C-suite has the desire to continue to improve based on results.

How Mature is Your Resource Management Practice?

So, where did you land? Do you want to move up the ladder? The following pages in the flipbook will show you what needs to be done to increase your maturity.

Level 1: Ad-Hoc or Initial

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Initial: Achieving resourcing goals depend on individual effort and heroics. Work gets done but it is not sustainable for the long term, and key staff may be lost to burn-out.

Level 1 to Level 2

- Agree as an organization that you are ready to mature your resource management practice!
- Create and document policies and procedures
  - Policies should establish best practices for your organization
  - Assure they will help the teams be successful
  - Make sure there is a repository for easy access
  - Feedback loop to make sure policies are being followed
  - Create a self-audit plan
- Concentrate on the basics – resource names, availability, skills, and utilization
- Define Key Performance Indices (KPIs) for your project
- Provide role-based training on policies and procedures
- Evaluate tools and evaluate future needs

Level 2: Project by Project or Basic

Basic Management: Resource management processes are in place and the necessary process discipline exists to repeat earlier successes on projects with similar applications.

Level 2 to Level 3

- Measure adherence of enterprise policies and procedures
- Information is shared across projects with modern tools
- Enterprise wide labor categories and skills inventory/classifications
- Defined skill levels used for resource selection
- People, processes & tools provide an enterprise wide resource forecast
- Resources are budgeted and forecasted at the task level
- Supply and future supply of resources is visible
- Resource demand is visible to all project stakeholders
- Projects are being planned with resource constraints in mind
- Decide on a common set of enterprise wide and project level KPIs
- Automation of the process with the right tool

Level 3: Organization-Wide

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Organizational Standards: Processes are documented and standardized, with approved tailored approaches adopted as needed.

Level 3 to Level 4

- Use data (historical and current) to drive hiring and placement decisions
- Common tool for enterprise level resource and skills budgeting and forecasting that all stakeholders have access to
- Formal resource requesting process
- Standard resource management metrics/KPIs with visibility of performance goals/thresholds
- Self-reporting on utilization
- Align resource forecasts and plans to corporate goals and objectives
- Realtime resourcing information – reports and dashboards
- Utilize KPIs to directly influence achievement of business goals and to make great business decisions
- Pipeline is also resourced for full look at the total needs of the business
- Tools now support the process with minimal manual touches
- Continue role-based training for all stakeholders
- Tools training is a recurring activity

Level 4: Quantitative/Data Driven

Managed Process: Detailed measures on process of resourcing practices are quantitatively measured, understood and managed.

Level 4 to Level 5

- Measure Invest in your people with training and a career path
- Establish a continuous feedback loop from all stakeholders
- Incentivize employees to be creative and listen to the suggestions
- Continue to evolve your processes looking for areas to improve
- Collect and utilize lessons learned and drive them into your process
- You will feel the organization firing on all cylinders

Level 5: Continuous Improvement

Continuous Improvement: Continuous process improvement is enabled by quantitative feedback from the process and from piloting innovative ideas and technologies..

WELCOME TO UTOPIA

Hope you enjoyed your journey

Do We Have to Be a Level 5?

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As an organization, it is important to decide what level is needed to achieve your business objectives. Some may say that level 3.5 is adequate and it will meet their needs. Others might need a complete managed process that is striving for optimization so a 4.3. Making that decision is key to establishing a roadmap and overall timeline.

5 Continuous Improvement

4 Quantitative

3 Organizational Standards

2 Basic Management

1 Ad-hoc

Benefits of Maturing Your Resource Management Practice

1. Improved visibility and control into enterprise resource needs and utilization
2. Improved predictability and understanding of overall performance
3. Common organizational standards ensuring consistent reporting, reduction of rework, and reduced dependence on heroes.
4. Optimization of the project management staff allowing them to focus on their customer, not on turning the crank.
5. More efficient communication within project teams and to senior leadership.
6. Delivery of real-time insight on project financials and enable resolution of identified risks.
7. More on-time and on-budget projects which equals a delighted customer.

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Unanet is the Best Resource Management Tool on the Market Today!

People Resource Allocation – MGR06-Resource Allocation

Booked % Color: ● <= 50% ● 51% - 100% ● >= 101%
Date Range: 5/26/2019 - 8/17/2019
Including Plans Only
Showing Booked Percent

Person Organization: CS-PROC-ENG

PERSON	MAY 26	JUN 02	JUN 09	JUN 16	JUN 23	JUN 30	JUL 07	JUL 14	JUL 21	JUL 28	AUG 04	AUG 11	TOTAL
User, Carmine	123%	122%	122%	122%	122%	88%	88%	88%	88%	91%	96%	96%	104%
User, Caroline	100%	105%	105%	105%	105%	140%	140%	140%	140%	122%	96%	96%	116%
User, Chad	100%	105%	105%	105%	105%	162%	162%	162%	162%	171%	185%	185%	142%
User, Eleanor S.	125%	131%	131%	131%	131%	23%	23%	23%	23%	67%	132%	132%	90%
Totals for CS-PROC-ENG:	112%	116%	116%	116%	116%	103%	103%	103%	103%	113%	127%	127%	113%

Person Organization: CS-TECH-SERV

PERSON	MAY 26	JUN 02	JUN 09	JUN 16	JUN 23	JUN 30	JUL 07	JUL 14	JUL 21	JUL 28	AUG 04	AUG 11	TOTAL
Director, Chris S.	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Hourly, Cole	331%	283%	283%	283%	283%	65%	65%	65%	65%	67%	71%	71%	161%
User, Carla	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
User, Charlie	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
User, Charline	125%	131%	131%	131%	131%	96%	96%	96%	96%	105%	119%	119%	115%
User, Clark A.	128%	134%	134%	134%	134%	152%	152%	152%	152%	155%	160%	160%	146%
Totals for CS-TECH-SERV:	93%	90%	90%	90%	90%	65%	65%	65%	65%	68%	71%	71%	77%

Person Organization: DS

| PERSON	MAY 26	JUN 02	JUN 09	JUN 16	JUN 23	JUN 30	JUL 07	JUL 14	JUL 21	JUL 28	AUG 04	AUG 11	TOTAL
Director, Darla	85%	89%	89%	89%	89%	197%	197%	197%	197%	320%	506%	506%	213%
Planner, Donna	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
User, David	20%	21%	21%	21%	21%	19%	19%	19%	19%	20%	21%	21%	20%
User, Dustin A.	85%	89%	89%	89%	89%	94%	94%	94%	94%	97%	102%	102%	93%
Totals for DS:	48%	50%	50%	50%	50%	77%	77%	77%	77%	109%	157%	157%	82%
Grand Totals:	85%	86%	86%	86%	86%	80%	80%	80%	80%	94%	114%	114%	89%

# Dial-in Your Resource Plan with Realtime Information
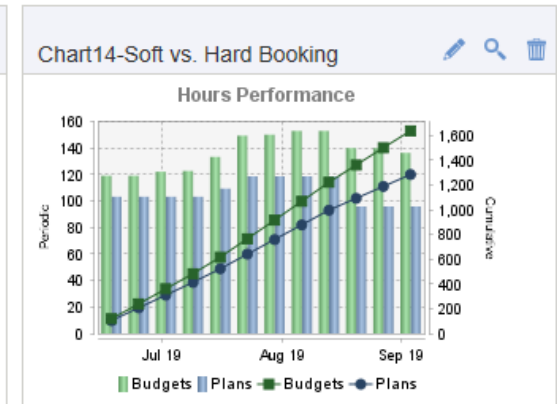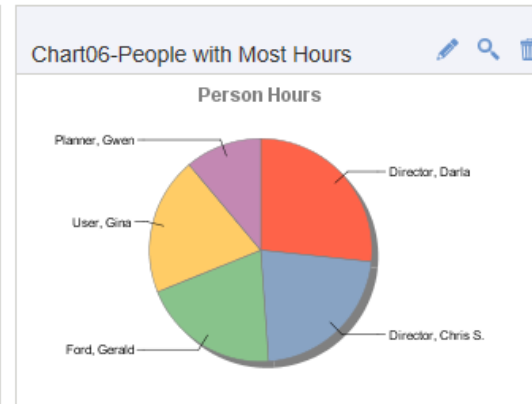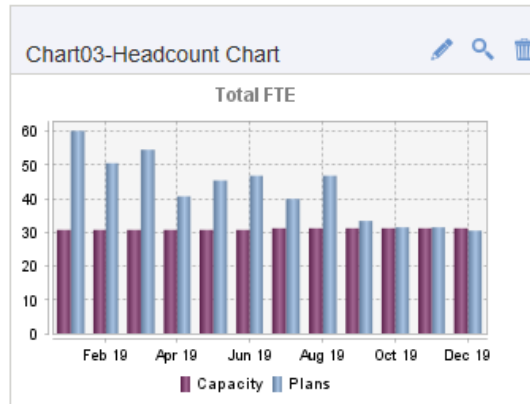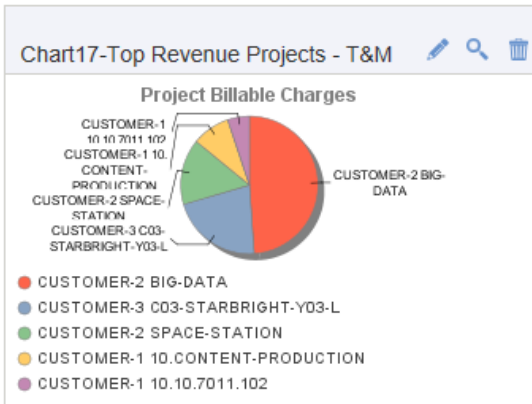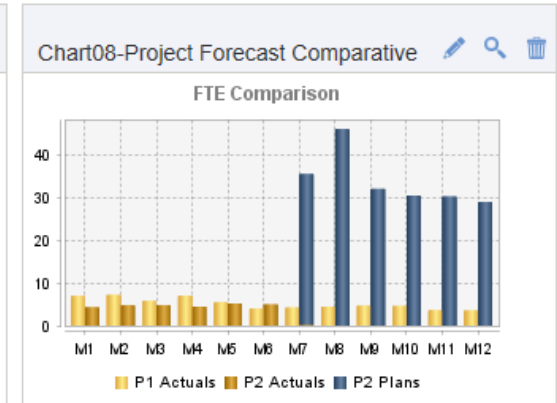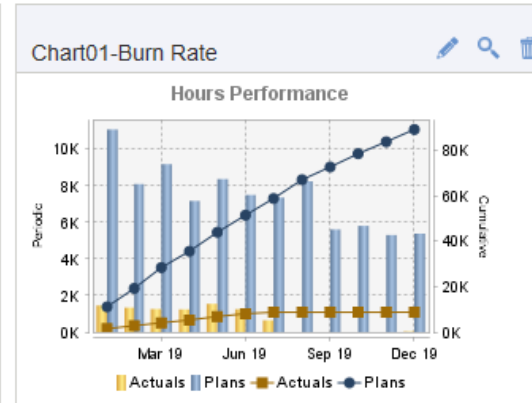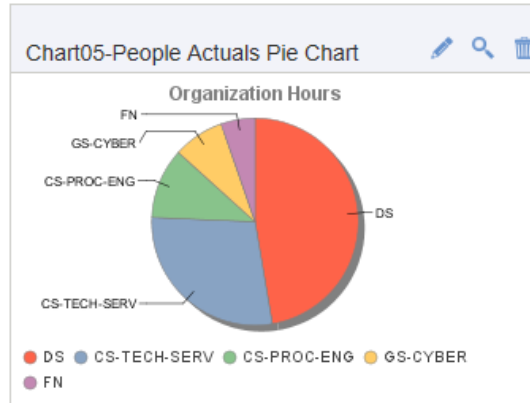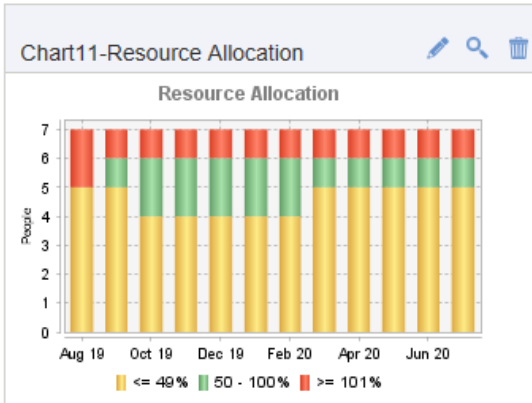
One Software for Projects, People & Financials

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PLAN

- CRM & Pipeline Mgmt
- Purchase Requisition
- Budgeting & Revenue Forecasting
- Resource Scheduling
- Skills Mgmt
- Scenario Planning
- Pricing

EXECUTE

- Timesheets
- Expense Reports & Per Diems
- Purchase Orders
- Approvals
- Collaboration and Notes
- Contract Mgmt

MONITOR

- Real-Time Dashboards & KPIs
- Project Status, Utilization, & Burn Rate
- Open Commitments
- Gross & Net Margin
- % Complete & EVM
- Backlog

RECOGNIZE

- GAAP Compliance
- T&M, FP, and CP
- Revenue Recognition – As Worked, % Complete & Schedules

ACCOUNT

- General Ledger
- Accounts Payable
- Accounts Receivable
- Cost Pools
- Indirect Rates
- PO Match: 2-Way or 3-Way Match

Integrates with 3rd Party Payroll Providers