

### Inhibitors to Effective Resource Management



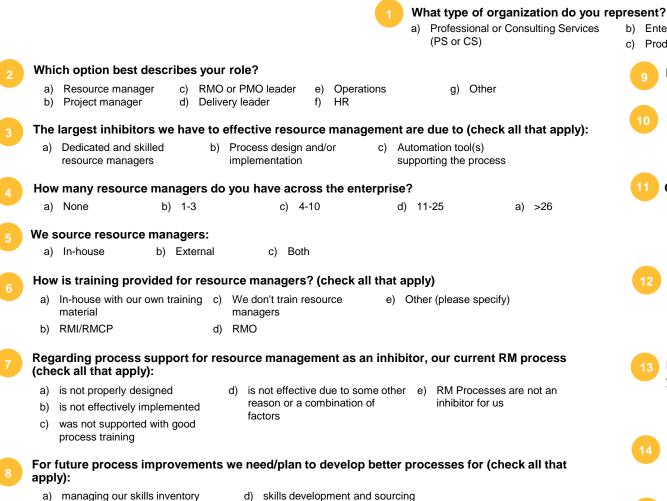


### **Survey Background**

- This was the second survey on RM inhibitors and now expanded to include four different project-based domains. The survey was conducted in 1Q/2020.
- Input was provided from 68 different companies, by PS/EIT/PD/MA services executives, resource and project managers, production managers, and resource management office leadership.
- Professional/Consulting services and Enterprise/IT services made up 93% of the respondents. Recently added to the Survey Series is input from Product Development organizations and Marketing Agencies. These project-based domains share many of the same RM challenges offering good cross-industry perspectives leading to improved best practices.



### Survey Questions



e) governance of our RM processes

f) Other (please specify)

- b) Enterprise/IT (E/IT) d) Marketing Agency (MA)
  c) Product Development (PD)

  For automation of our resource management processes, we primarily use:
- Regarding automation tool(s) support, our current tool(s) for RM support are:

  a) effective and require no changes
  b) somewhat effective but could be improved
  c) a known area for improvement

b) Spreadsheet

- Current inhibitors in our automation support for RM include (check all that apply):

  a) lacks features we need

  c) lacks integration with our other

  e) lacks data analytics
  - b) not configured properly to support our RM process
- c) lacks integration with our other front and back office system(s) for forecasting
   d) lacks sufficient dashboard

capabilities and/or reporting

 f) we have no issues with our current automation support for RM

c) In-house developed software

- Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply):
  - a) skills inventory/database capabilities
- d) skills development planning

b) forecasting and capacity planning

e) reporting, dashboards and data analytics

c) project staffing

a) PSA, PPM or RPM tool

- f) Other (please specify)
- If you listed data analytics as an inhibitor in Question 11, what data analytics capabilities would you want (check all that apply):
  - a) better data integration with our front-end and back-end systems with relevant RM data
- b) ability to quickly generate 'what c) Other (please specify) if scenarios
- Are you using any kind of artificial intelligence features to support your resource management initiatives?
  - a) Yes b) No
- Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority):
  - a) Forecasting

- b) Staffing projects
- c) Staff development planning

c) project staffing

b) forecasting and capacity planning

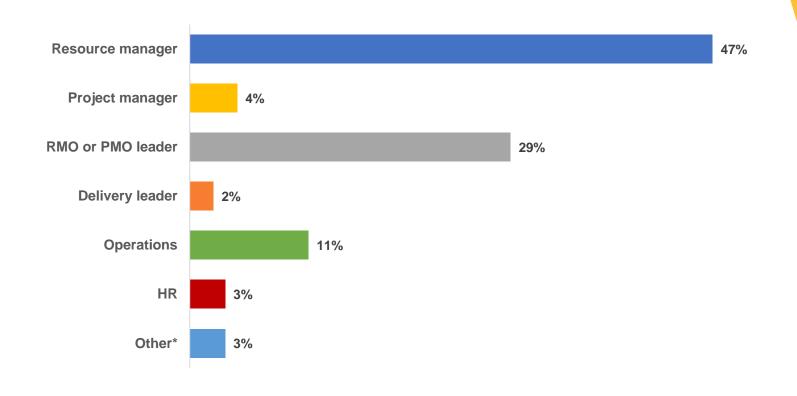
### **Key Takeaways**

- Overall process and automation technology continue to be opportunity areas for RMOs, while growing talent for more sophisticated RM environments we believe will continue to grow in importance.
- Process has always trumped tools when it comes to priority order for making important business transformation investments. With RM this concept is no exception. The RMI will continue to play an important role in industry process standardization with Just-in-Time Resourcing® and supporting training to aid the overall industry acceleration of progress in RM.
- Data will be a critical lynchpin for acceleration of progress with the RM discipline as reflected in this report indicating demand for better dashboards, additional analytics, improved data integration, and potential applications for artificial intelligence (AI).





### Q2: Which option best describes your role? – PS/CS



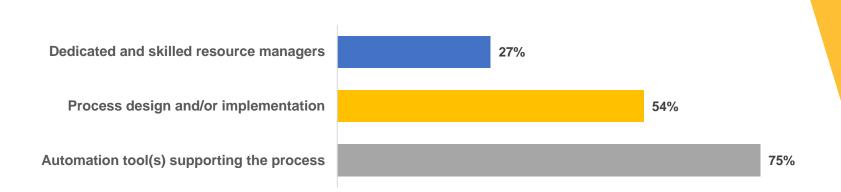
We had a good cross-section of respondents from various management and non-management roles.

Other:

- Consultant
- CFC
- Combination of RM and Services Manager

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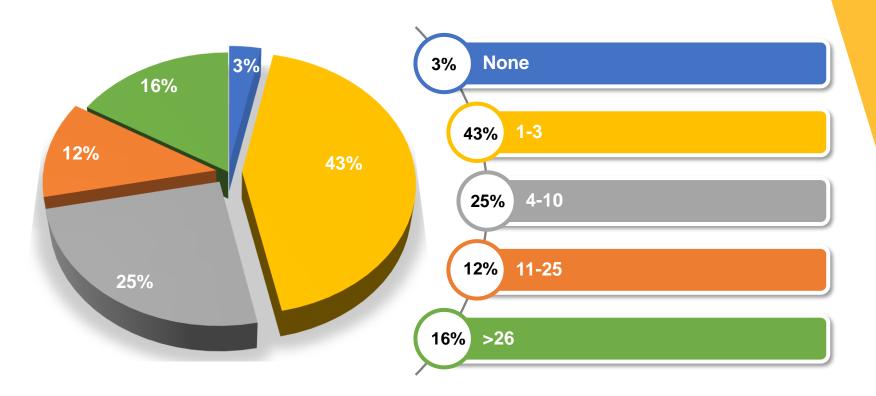
# Q3: The largest inhibitors we have to effective resource management are due to (check all that apply): – PS/CS



Results since 2018 are nearly identical with technology and process issues leading the list.

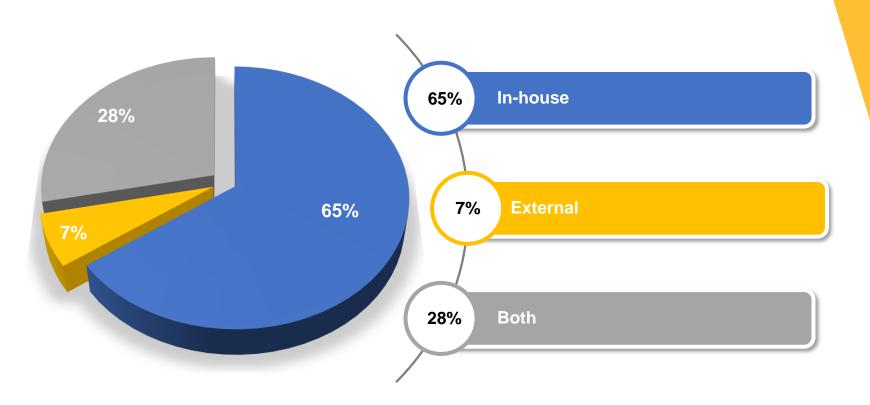
A 4% increase in respondents citing trouble with finding/keeping skilled resource managers is no surprise given growth of companies focused on improving RM performance.

### Q4: How many resource managers do you have across the enterprise? – PS/CS



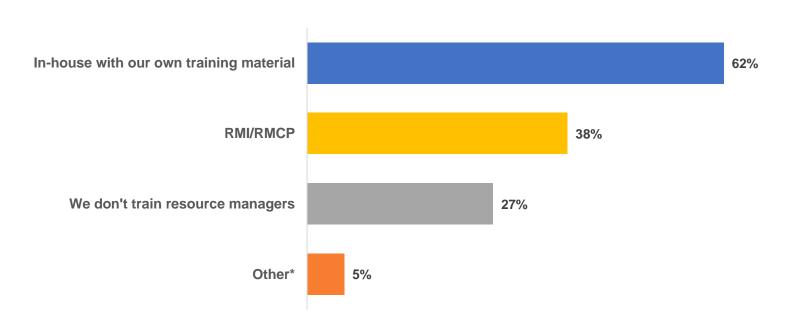
We had a good crosssection of different size organizations responding to the survey.

### Q5: We source resource managers: – PS/CS



No surprise that sourcing RMs is led by in-house sources. Skilled RMs are in short supply as the industry races to catch up with growing interest in better RM performance.

### Q6: How is training provided for resource managers? (check all that apply) – PS/CS



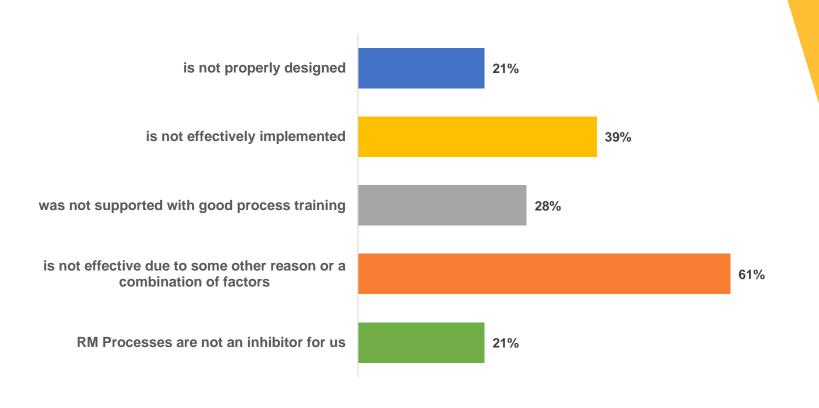
In-house training still leads the list but dropped by 26% since the 2018 survey, while the RMI's RMCP® program grew 8% as a source of structured training for process excellence in RM. Those not offering any training remains unchanged from prior surveys.

Other:

- Job shadowing
- Desktop procedures from previous RM
- In-house through knowledge transfer and mentorship
- Design Leads are tasked with Resource Management
- On-the-job training

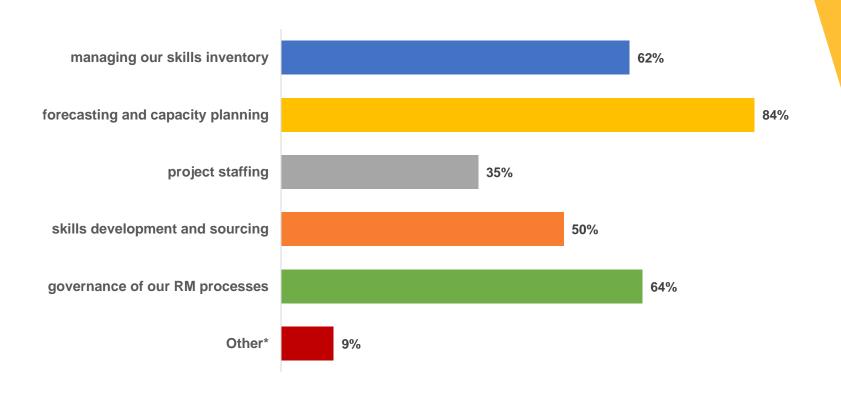
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# Q7: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply): – PS/CS



Firms reporting that their RM process is not an inhibitor grew by 4% to 21% vs. our 2018 survey. That bright spot was still overshadowed by the remainder having issues with process design, implementation approach, training or some combination of these factors.

# Q8: For future process improvements we need/plan to develop better processes for (check all that apply): – PS/CS



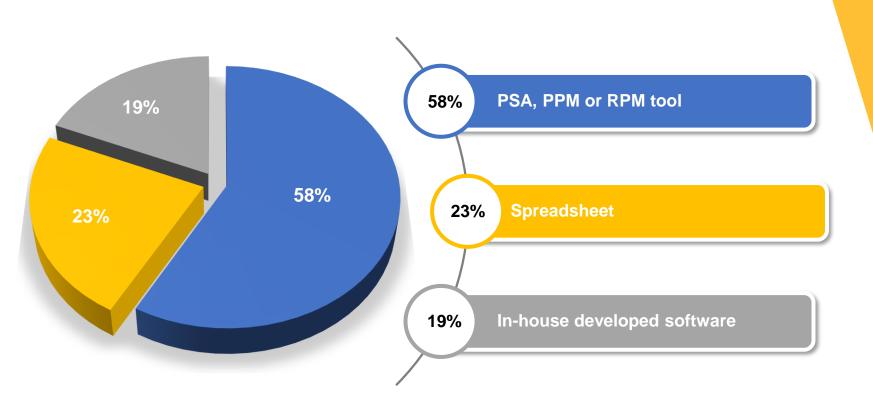
Results were very similar to our 2018 survey. Without a data-based view of the future and a useful skills inventory, resource planning becomes a backwards looking and largely useless process. RMI research is clear that poor design and execution of these two essential elements leads to frequent RM process failures. Governance also remains an important area for improvement.

Other:

- Tools in support of our process
- Change Management and Exec Sponsorship
- Business Lines need to follow RDM Best Practices
- Resourcing visibility with tool. Focus of management on importance of RM

- Need Support & Decisions from Top Management to support true RMO
- Global resource management consistency
- Clearly defined RACI PMO

# Q9: For automation of our resource management processes, we primarily use: – PS/CS



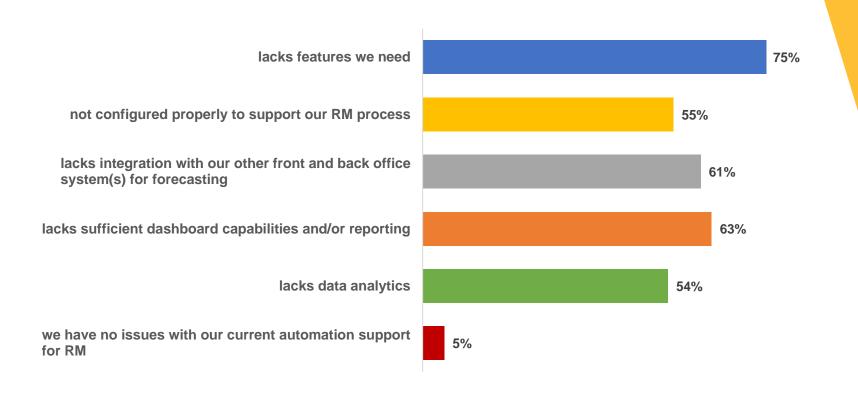
58% of users are using some commercially available PSA/PPM/RPM tool for automating their RM processes. Nearly a quarter are using spreadsheets, with roughly 17% using an inhouse developed tool. Overall the RMI has been watching trending data shows that the commercial tools are getting better and dependencies on spreadsheets are on the decline.

# Q10: Regarding automation tool(s) support, our current tool(s) for RM support are: – PS/CS



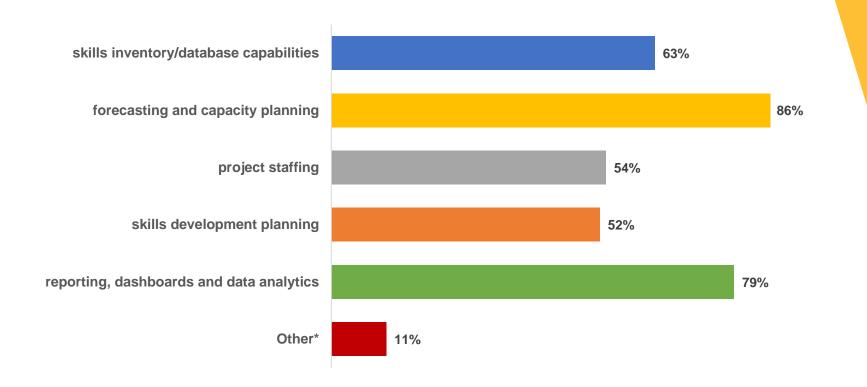
Those reporting effective to somewhat effective are up slightly from prior surveys, and plans for improvement activity up 5% from 2018, while total system replacement plans are down 5%. The RMI has been tracking member success with automation solution optimization by better aligning process with technology via reconfiguration or process enhancements or both.

# Q11: Current inhibitors in our automation support for RM include (check all that apply): – PS/CS



Lack of features tops this list again from our 2018 survey, as does virtually every other inhibitor cited. The RMI believes this increase is attributed to increased sophistication of RMOs putting more demands on their automation solutions.

# Q12: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply): – PS/CS



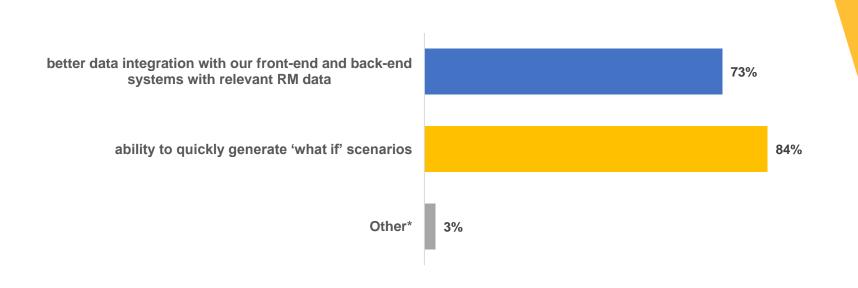
These results are quite similar to the 2018 survey. Better forecasting and a useful skills database underpin any successful RM process so no surprise these remain big demand areas. Useful data via analytics and dashboards are clearly growing in demand as RM methods become more sophisticated and enterprise value of RM is more broadly embraced.

Other:

- Use of AI and automating specific processes
- Workflow
- · Specifically bench reporting
- Integrations with other business tools NetSuite, google calendar, zoom, etc.
- · All of the above are being worked on

- Integration with other business systems for access to real time data; integration with project schedule, cost, contract data
- TRUE RMO & PMO Interactive tool in 1 location providing EVERYTHING we need
- Global resource management process streamlining
- PSA Calendar, lacks views we need to stay organized.

# Q13: If you listed data analytics as an inhibitor in Question 11, what data analytics capabilities would you want (check all that apply): – PS/CS



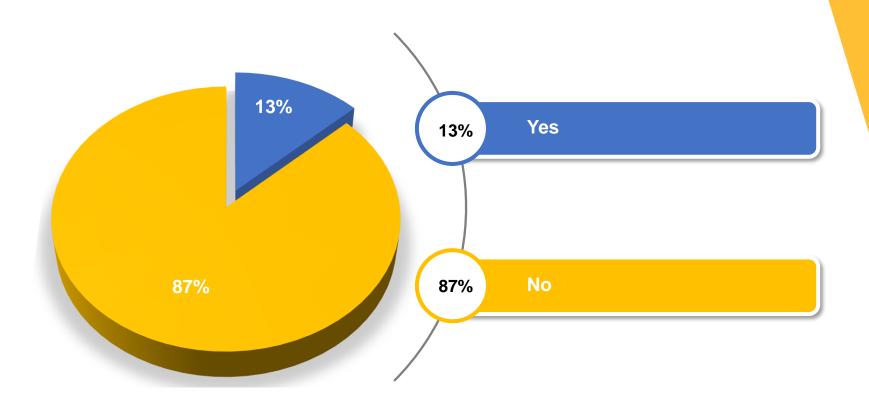
The need for data integration dropped slightly and ability to generate 'what ifs' increased slightly. This is very much in line with what the RMI hears from member inquiries and discussions. Our insights on the PSA/PPM vendors is that they are very focused on these needs and the smart money is prioritizing RM capabilities over other needs.

Other:

- Integration with our billing and accounting systems
- Analytics is slow with current system

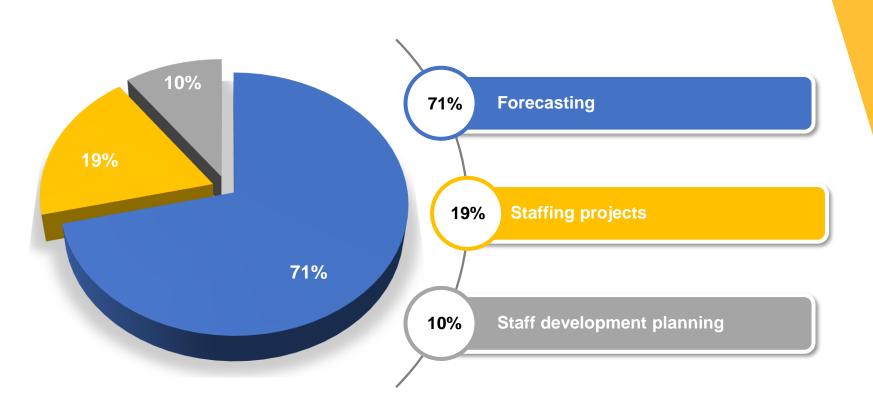
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# Q14: Are you using any kind of artificial intelligence (AI) features to support your resource management initiatives? – PS/CS



While we have no trending data yet on AI related to RM applications due to the nascent nature of the technology, we will begin to track this as well. AI has many potential future possibilities. With 13% now reporting they are using AI for RM, we are excited to see how AI accelerates RM outcomes in the future.

# Q15: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority): – PS/CS



No surprise since so many organizations struggle with forecasting, that AI is a target application. While using Al for staffing was cited less, we think this is an area that will see much more focus as most automation solutions could benefit from how Al could help with automated staffing.



#### Q2: Which option best describes your role? – MA



Resource managers
were the only
respondents to this
survey for the MA
domain. We hope as we
grow our reach into this
space we will grow a
good cross-section of
MA roles as participants
in future research and
other RMI activities.

# Q3: The largest inhibitors we have to effective resource management are due to (check all that apply): – MA



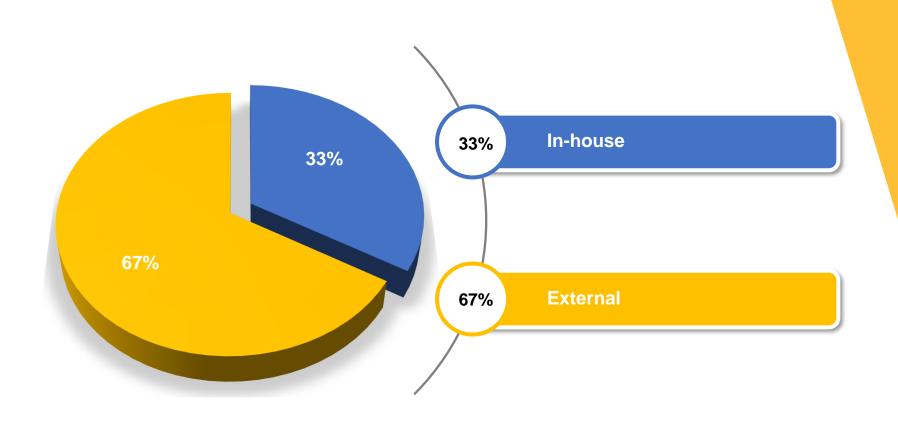
Both process design and a lack of sufficient automation tools were cited as biggest inhibitors for the MA domain.

### Q4: How many resource managers do you have across the enterprise? - MA



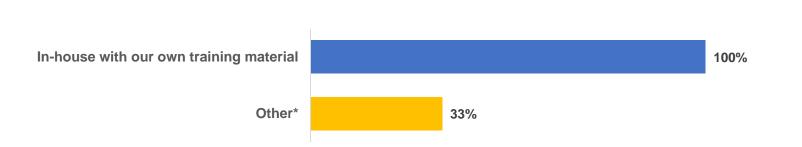
This survey had respondents that primarily represented firms with less than 500 billable resources.

#### Q5: We source resource managers: – MA



Interesting that vs. all other surveyed domains, the MA domains have focused externally for RM talent. The RMI believes this is due to agencies adopting advanced RM methods later than some of the other project-based domains, therefore making good sense to seek experienced RMs early in their process maturation efforts.

### Q6: How is training provided for resource managers? (check all that apply) – MA

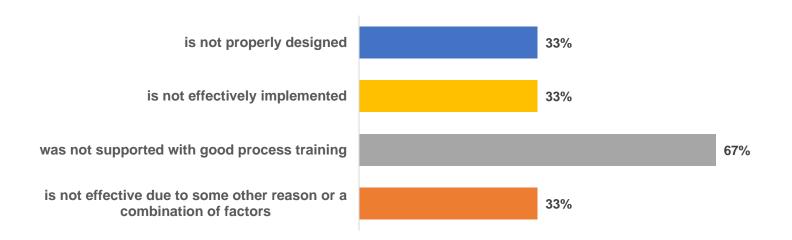


The good news is this domain is providing training to their RM resources. Over time we hope the RMI will reach more agencies with already available training for the industry standard Just-in-Time Resourcing® approach to effective RM. This will save firms time and money, and assist with process and training standardization within their own organizations.

Other:

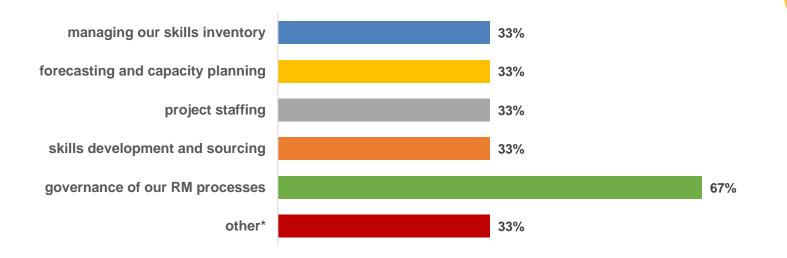
· Learn as you go

# Q7: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply): – MA



The survey identified lots of upside potential for the MA domain to make more rapid progress for implementing effective RM.

# Q8: For future process improvements we need/plan to develop better processes for (check all that apply): – MA

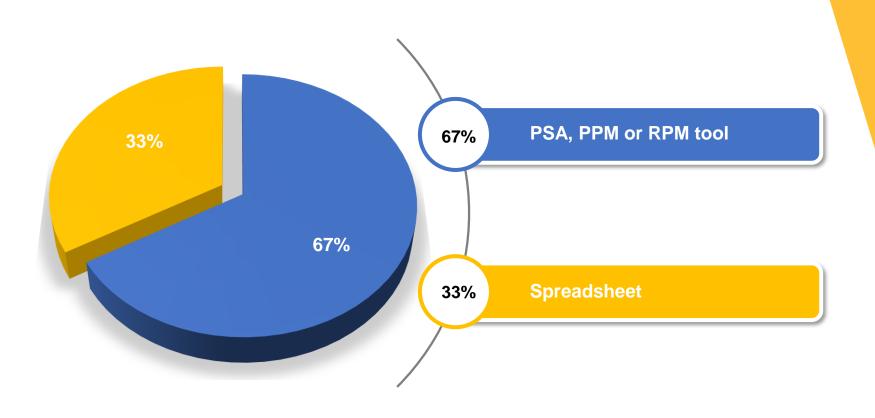


Like the PD domain, the MA domain lags other project-based domains in the maturity of their RM processes and many start by measuring desired outcomes to establish a baseline and then develop better processes to improve those outcomes.

Other:

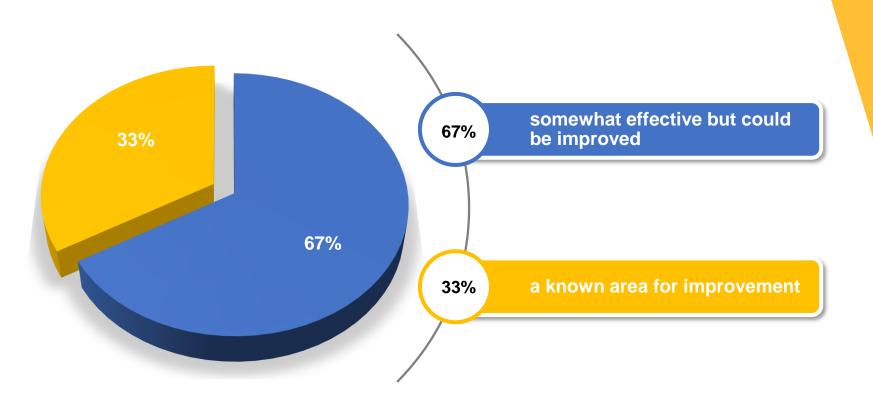
<sup>•</sup> The data provided by RMO will be properly used to set up strategies for the company

# Q9: For automation of our resource management processes, we primarily use: – MA



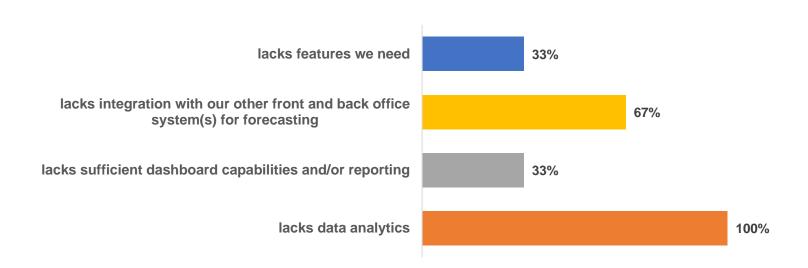
Two-thirds of users are using some commercially available PSA/PPM/RPM tool for automating their RM processes. Another third are using spreadsheets. Overall the RMI has been watching trending data indicating that commercial tools are getting better and dependencies on spreadsheets are on the decline.

### Q10: Regarding automation tool(s) support, our current tool(s) for RM support are: - MA



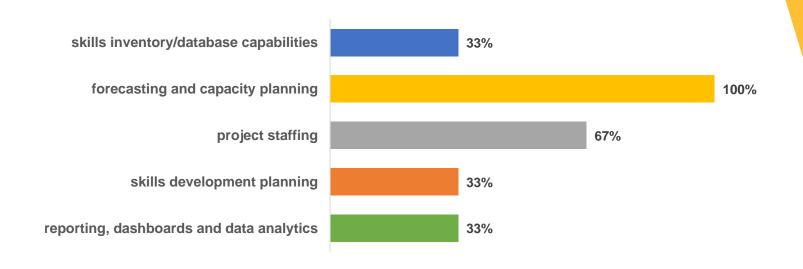
The RMI is aware of good solutions which exist to address RM needs for Agencies. We believe digital transformation will become a growing focus as these firms begin to realize the tremendous business benefits of effective RM.

# Q11: Current inhibitors in our automation support for RM include (check all that apply): – MA



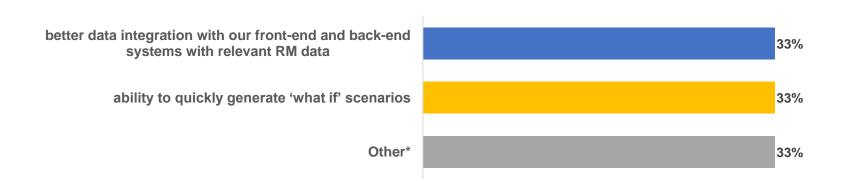
Systems and application integration and analytics led this list for Agencies representing an opportunity for the automation tool vendors.

# Q12: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply): – MA



Forecasting topped this list and is typically one of the two most important building blocks for implementing effective RM. The focus on staffing is no surprise given the tactical demands of staffing current demand.

# Q13: If you listed data analytics as an inhibitor in Question 11, what data analytics capabilities would you want (check all that apply): – MA

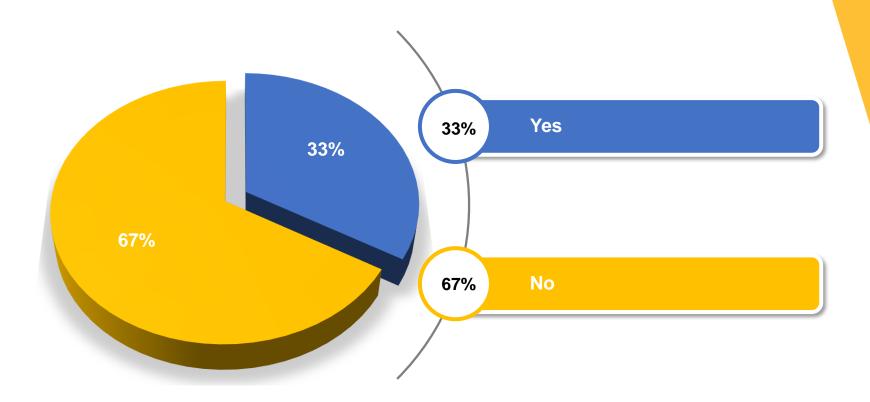


Better data integration and the ability to easily run more 'what if' scenarios were equally important. Some of the 'other' responses related to reducing dependence on spreadsheets and gaining better graphical capabilities for representing actionable data.

Other:

· Ability to generate graphics without use of Excel

# Q14: Are you using any kind of artificial intelligence (AI) features to support your resource management initiatives? – MA



A big surprise was the % of MA firms using AI for RM. We believe with a larger sample size this result would have been lower however that is entirely speculative.

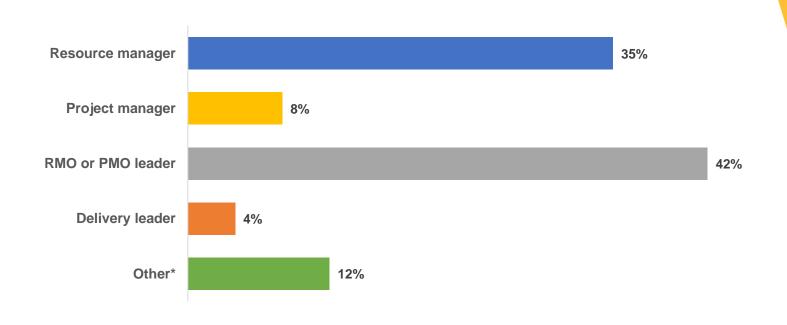
# Q15: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority): – MA



Consistent with most project-based service teams, everyone wants better IT support for forecasting where AI can play a significant role.



#### Q2: Which option best describes your role? – E/IT



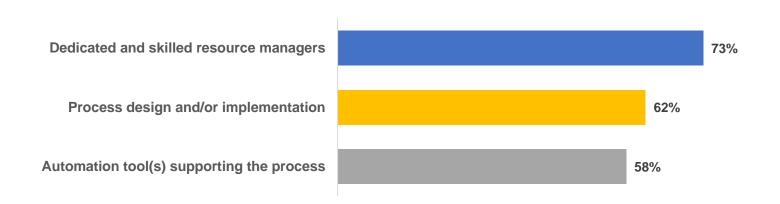
We had a good crosssection of respondents from various management and non-management roles.

Other:

- VP Enterprise PMO
- Service Manager
- Resource Planner/Business Analyst

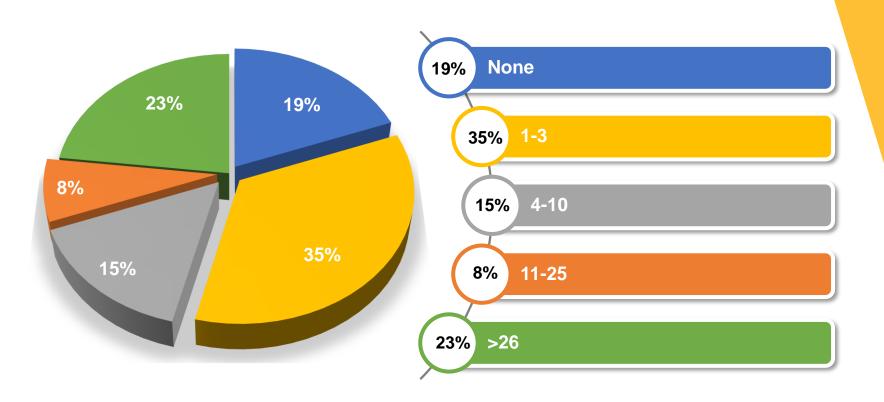
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### Q3: The largest inhibitors we have to effective resource management are due to (check all that apply): – E/IT



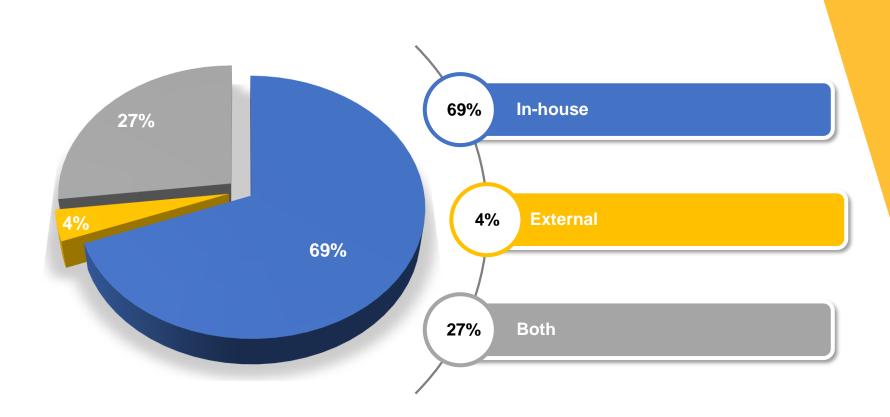
While process and automation technology remain important inhibitors since we last surveyed this group in 2018, the shortage of skilled RM staff jumped to the top of the list. This is no surprise given growth of E/IT teams now focused on improving RM performance has spiked dramatically.

#### Q4: How many resource managers do you have across the enterprise? – E/IT



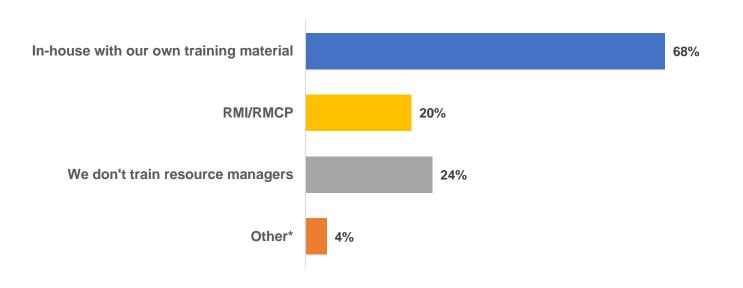
We had a good crosssection of different size organizations responding to the survey.

#### Q5: We source resource managers: – E/IT



No surprise that sourcing RMs is led by in-house sources. Skilled RMs are in short supply as the industry races to catch up with growing interest in better RM performance.

#### Q6: How is training provided for resource managers? (check all that apply) – E/IT

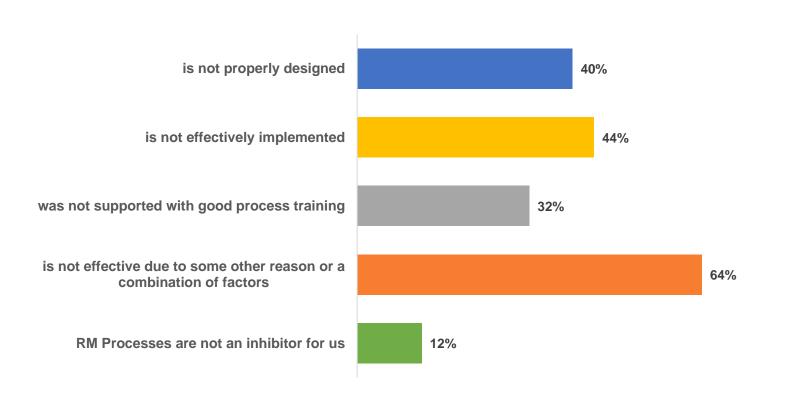


In-house training still leads the list but dropped by 20% since the 2018 survey. The RMI's RMCP® program held steady as a source of structured training for process excellence in RM. Those not offering any training is slightly higher from prior surveys.

Other:

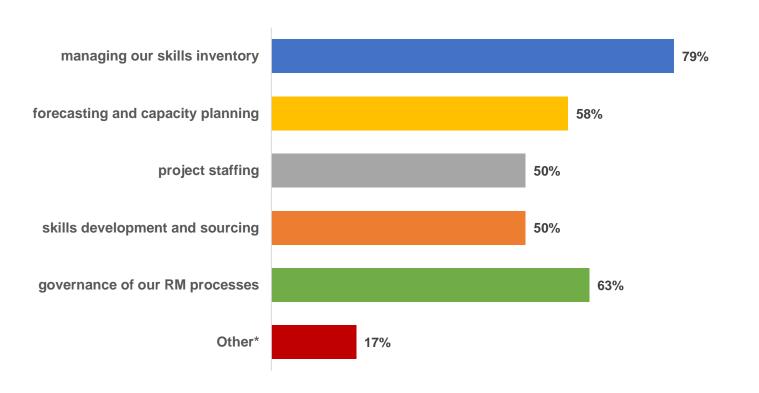
 We have one Enterprise Resource Manager and 55 IT Managers who are responsible for managing the resource planning for their direct reports.

### Q7: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply): – E/IT



Firms reporting that their RM process is not an inhibitor grew by 4% to 21% vs. our 2018 survey. That bright spot was still overshadowed by the remainder having issues with process design, implementation approach, training or some combination of these factors.

### Q8: For future process improvements we need/plan to develop better processes for (check all that apply): – E/IT



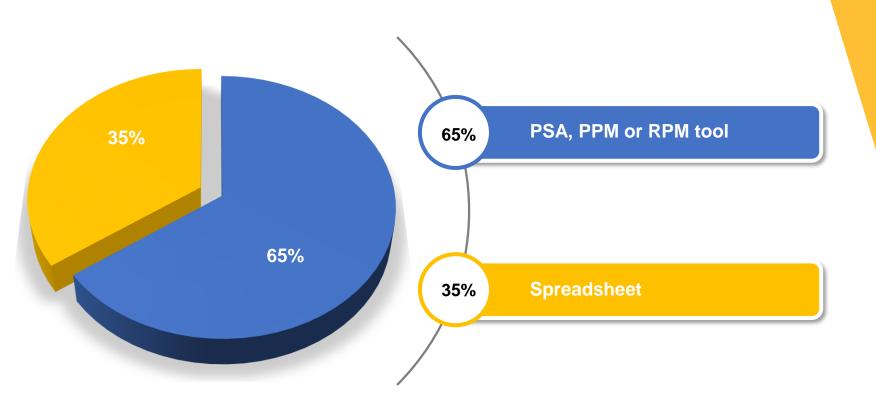
A useful skills inventory jumped to the top of the list vs. the 2018 survey. Forecasting and governance while getting less attention than 2018 still remain key areas of focus along with project staffing. RMI research is clear that a useful skills inventory combined with good forecasting are the two most essential elements needed to be effective at RM.

Other:

- Use of tools for resource management
- · We continue refining our governance process and in turn, we are having to retrain. This results in rework.
- Updated PPM system

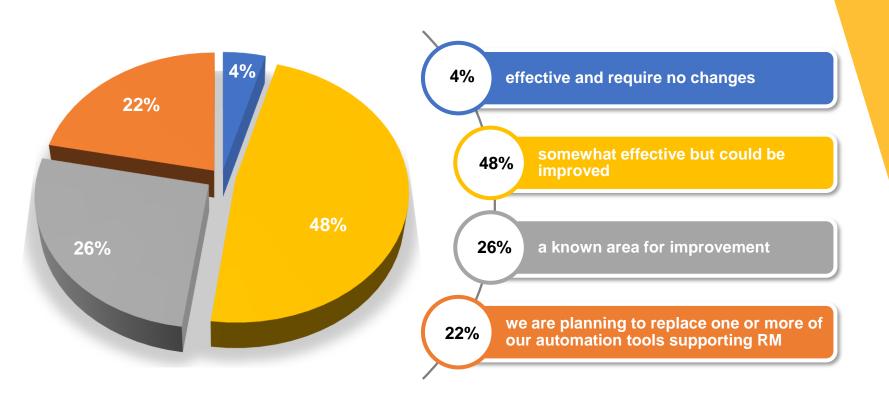
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### Q9: For automation of our resource management processes, we primarily use: – E/IT



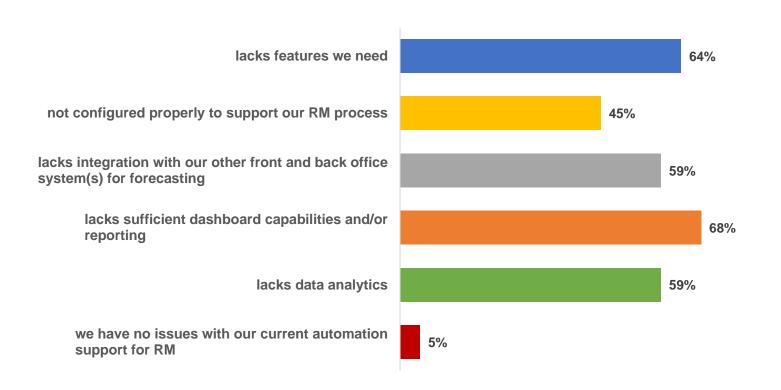
65% are using some commercially available PSA/PPM/RPM tool for automating their RM processes. More than a third are using spreadsheets. Overall the RMI has been watching trending data that the commercial tools are getting better and dependencies on spreadsheets on the decline.

#### Q10: Regarding automation tool(s) support, our current tool(s) for RM support are: - E/IT



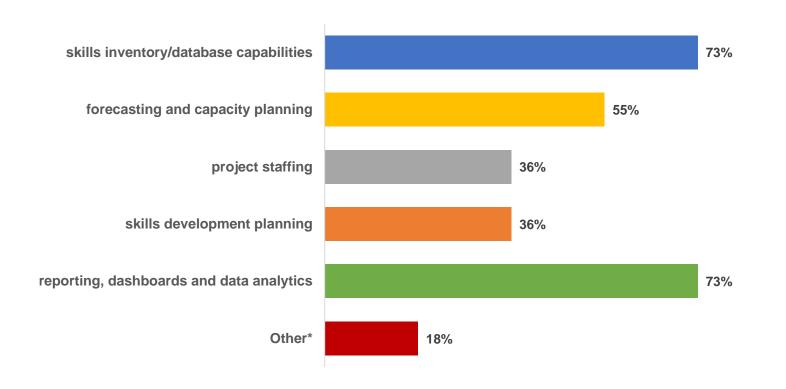
Those reporting effective to somewhat effective are up 14% from prior surveys, and plans for improvement activity down 11% from 2018, while total system replacement plans are down 3%. The RMI has been tracking member success with automation solution optimization by better aligning process with technology via reconfiguration or process enhancements or both.

### Q11: Current inhibitors in our automation support for RM include (check all that apply): – E/IT



Dashboarding tops this list
when compared to our
2018 survey. Data
analytics and features
were also highly rated.
The RMI believes these
needs are driven by
increased sophistication of
RMOs putting more
demands on
responsiveness and more
focus on data-based
decision making.

### Q12: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply): – E/IT



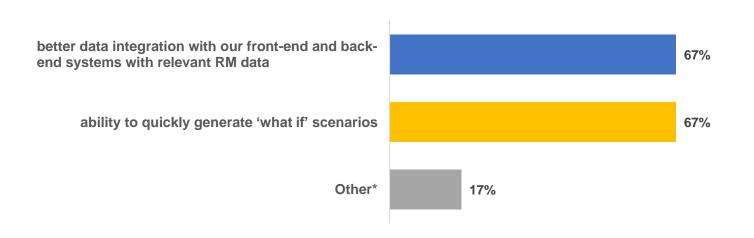
These results are quite similar to the 2018 survey. Better forecasting and a useful skills database underpin any successful RM process so no surprise these remain big demand areas. Useful data via analytics and dashboards are clearly growing in demand as RM methods becomes more sophisticated.

Other:

- Skills and/or Resource Requests
- · Adapting our processes to the vendor's 'best practices' to eliminate customizations
- We have no RM tools
- We plan to improve our existing tool

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### Q13: If you listed data analytics as an inhibitor in Question 11, what data analytics capabilities would you want (check all that apply): – E/IT



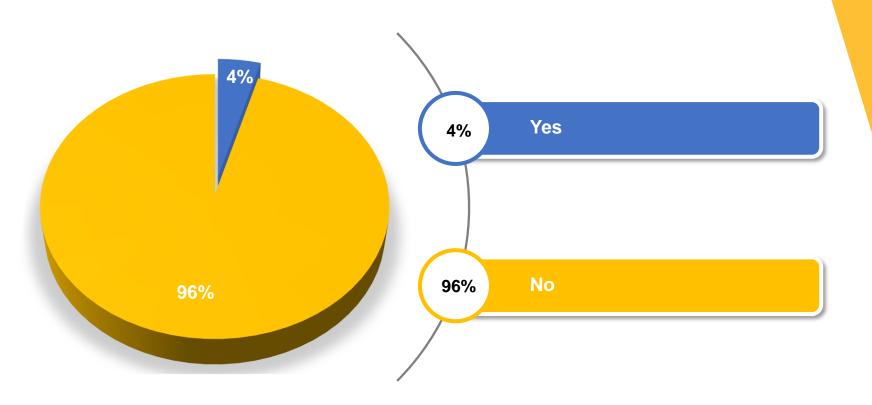
When compared to our 2018 survey, both better integration and the ability to generate 'what if' scenarios remain important to E/IT organizations. This is very much in line with what the RMI hears from member inquiries and discussions. Our insights on the PSA/PPM/RPM vendors is that they are very focused on these needs and the smart money is prioritizing RM capabilities over other needs.

Other:

- Ability to quickly see peoples' current and future capacity
- Our current product along with our use of it (processes) result in difficulty reporting allocated vs. actuals hours for operational categories (incidents, KTLO, etc.)

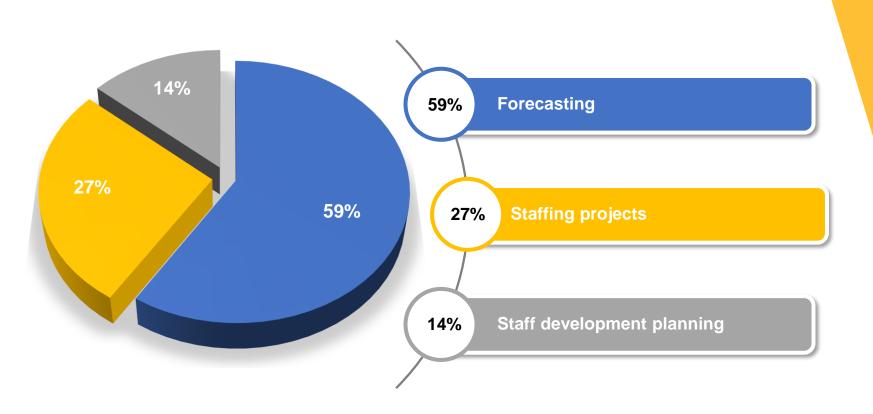
· We don't have any RM capabilities

### Q14: Are you using any kind of artificial intelligence (AI) features to support your resource management initiatives? – E/IT



Al is a nascent capability for RM in this space so no surprise here but we are seeing an increase in other project-based domains and we expect to see Al play a bigger role in E/IT RM applications in the future.

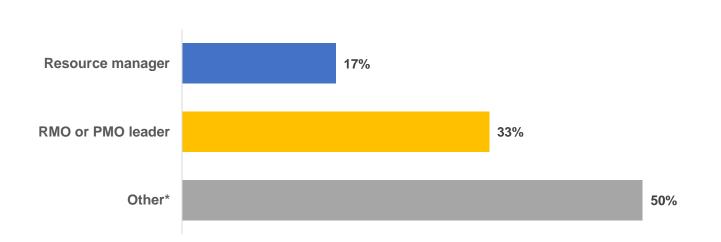
### Q15: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority): – E/IT



No surprise since so many organizations struggle with forecasting, that AI is a target application. While using AI for staffing was cited less, we think this is an area that will see much more focus as most automation solutions could benefit from how AI could help with automated staffing.



#### Q2: Which option best describes your role? – PD



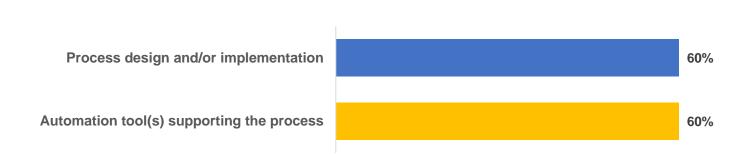
We had a good cross-section of respondents from various management and non-management roles.

Other:

- Portfolio Analyst
- Marketing
- Product Manager

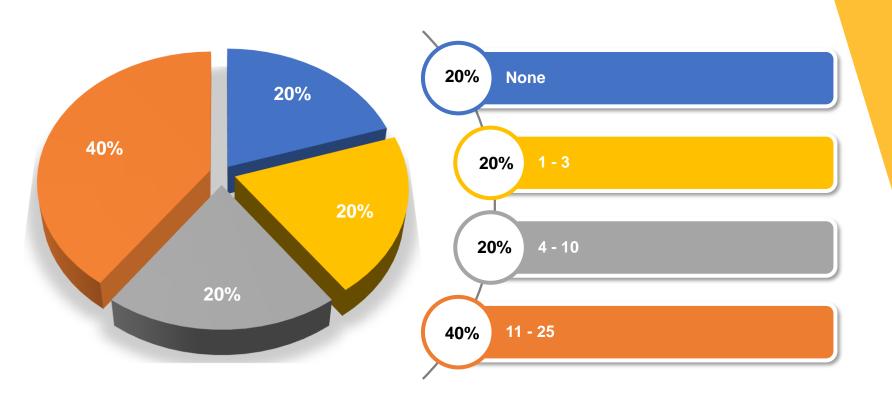
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### Q3: The largest inhibitors we have to effective resource management are due to (check all that apply): – PD



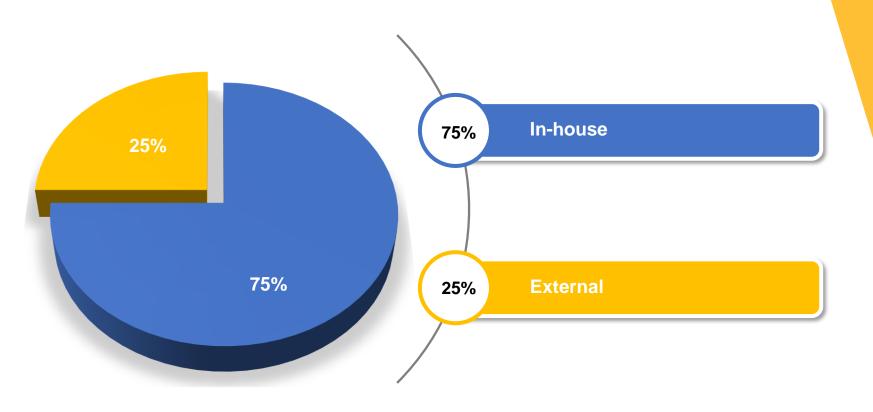
Both process design and a lack of sufficient automation tools were cited as biggest inhibitors for the PD domain.

#### Q4: How many resource managers do you have across the enterprise? - PD



We had a good crosssection of different size organizations responding to the survey.

#### Q5: We source resource managers: - PD



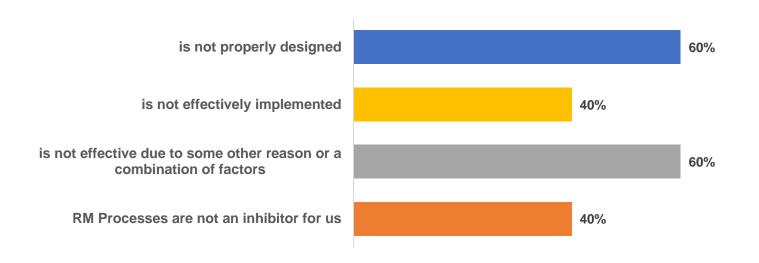
No surprise that sourcing RMs is led by in-house sources. Skilled RMs are in short supply as the industry races to catch up with growing interest in better RM performance.

#### Q6: How is training provided for resource managers? (check all that apply) - PD



Most problematic for the PD domain in RM is the lack of training being provided to those responsible for the RM function. Though not reflected in this respondent base, the RMI has been making good progress on putting more PD professionals through the RMI's certification program.

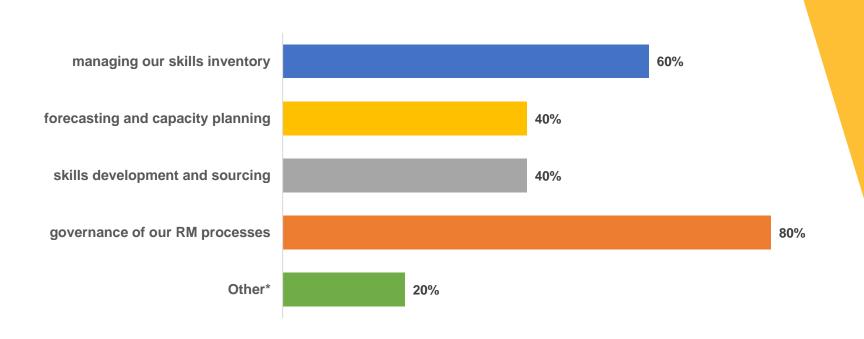
### Q7: Regarding process support for resource management as an inhibitor, our current RM process (check all that apply): – PD



40% of those surveyed do not see their current RM process as an inhibitor while 60% do.

No surprise about training given responses on the prior question.

### Q8: For future process improvements we need/plan to develop better processes for (check all that apply): – PD



No surprise that governance tops this list for PD. The RMI has observed that PD lags other project-based domains in investment and overall maturity of RM processes.

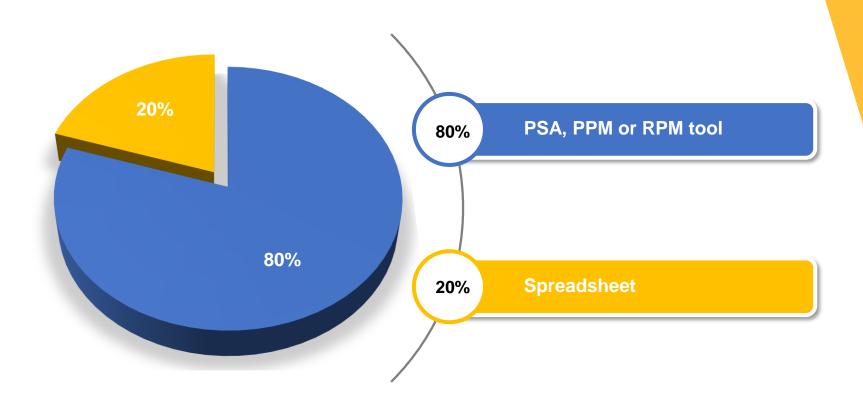
A focus on governance does indicate increasing attention being given to RM now and a need to develop better baseline data for improvement initiatives.

The next priorities on skills and forecasting are good to see as RMI research is clear that a useful skills inventory combined with good forecasting are the two most essential elements needed to be effective at RM.

Other:

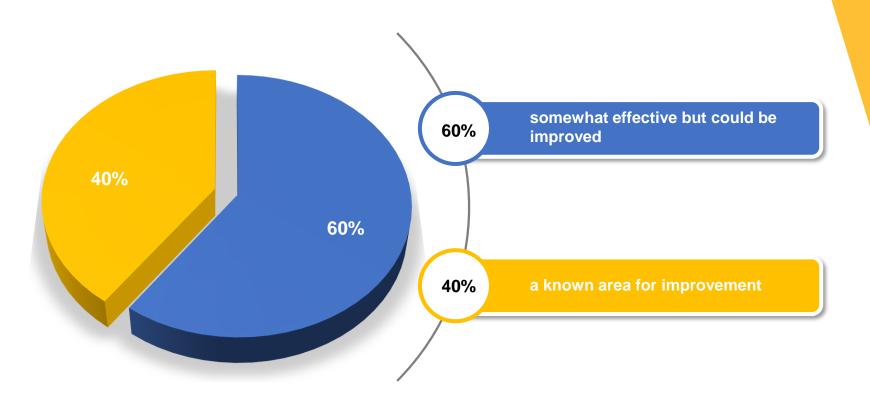
Demand management

#### Q9: For automation of our resource management processes, we primarily use: - PD



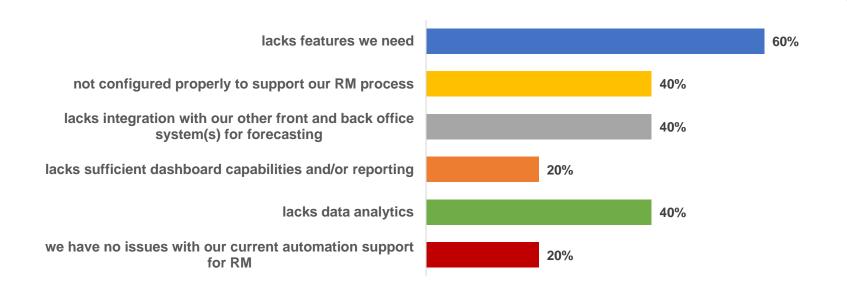
some commercially available PSA/PPM/RPM tool for automating their RM processes. 20% are using spreadsheets.
Overall the RMI has been watching trending data that the commercial tools are getting better and dependencies on spreadsheets on the decline.

#### Q10: Regarding automation tool(s) support, our current tool(s) for RM support are: - PD



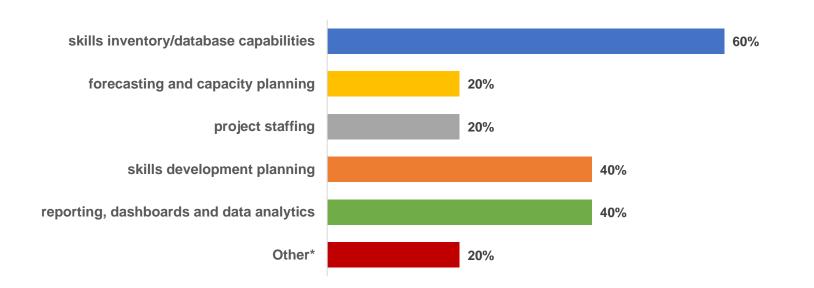
While 60% are somewhat happy with their automation tools, 40% see room for improvement.

## Q11: Current inhibitors in our automation support for RM include (check all that apply): – PD



Lack of features tops this
list. The RMI believes
this result is attributed to
increased focus on PD
governance which is
forcing a review of new
capabilities needed to
support RM execution
and management needs.

### Q12: Regarding future automation tool support for RM, we need/plan to address these current automation deficiencies (check all that apply): – PD



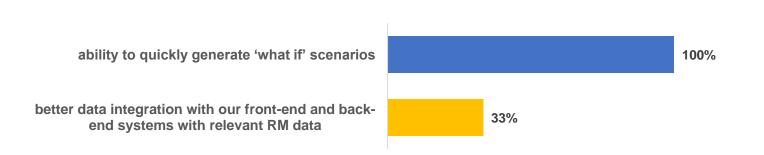
Building a useful skills database is the first step towards creating a true

Just-in-Time
Resourcing® capability for any project-based service team. PD is also focused on many of the other building blocks which lead to improved RM.

Other:

Integration with project, portfolio data

### Q13: If you listed data analytics as an inhibitor in Question 11, what data analytics capabilities would you want (check all that apply): – PD



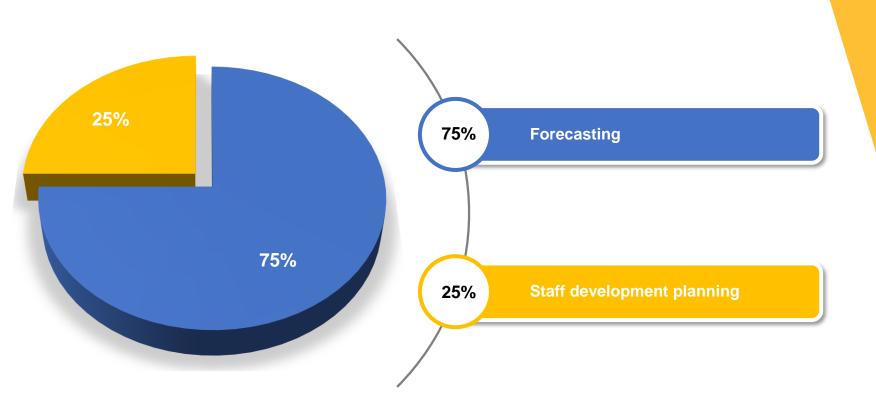
Addressing project priorities and inevitable resource conflicts can be greatly served with more 'what if' capability, a clear focus of our PD respondents.

### Q14: Are you using any kind of artificial intelligence (AI) features to support your resource management initiatives? – PD



Al is a nascent capability for RM in this space so no surprise here but we are seeing an increase in other project-based domains and we expect to see Al play a bigger role in PD for RM applications in the future.

## Q15: Artificial intelligence capabilities would be most helpful to us for (select just one to indicate your highest priority): – PD



No surprise since so many organizations struggle with forecasting, that AI is a target application. While using Al for staffing was cited less, we think this is an area that will see much more focus as most automation solutions could benefit from how Al could help with automated staffing.



### INHIBITORS TO EFFECTIVE RESOURCE MANAGEMENT Survey Summary

- Overall process and automation technology continue to be opportunity areas for RMOs, while growing talent for more sophisticated RM environments we believe will continue to grow in importance.
- Process has always trumped tools when it comes to priority order for making important business transformation investments. With RM this concept is no exception. The RMI will continue to play an important role in industry process standardization with Just-in-Time Resourcing® and supporting training to aid the overall industry acceleration of progress in RM.
- Data will be a critical lynchpin for acceleration of progress with the RM discipline as reflected in this report indicating demand for better dashboards, additional analytics, improved data integration, and potential applications for artificial intelligence (AI).



# RMI Survey Series



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