



# Resource Management Survey Series:

## *Automation Tools Survey*

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# Survey Questions and Breakout of Respondents

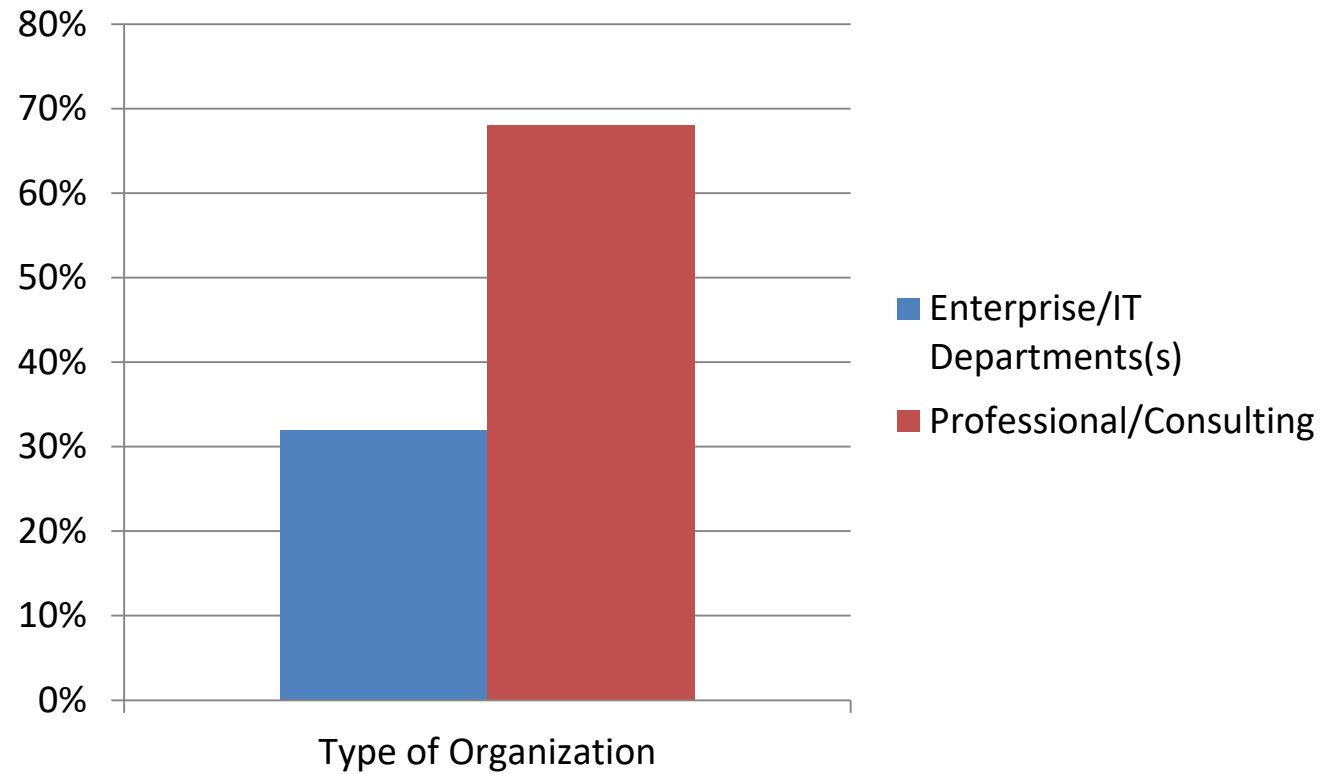
# Survey Questions

## ➤ Seven questions were asked:

1. **What type of organization do you represent?** Professional and Consulting Services or Enterprise/IT
2. **Does your organization currently utilize a Professional Services Automation (PSA) tool or Program & Project Management (PPM) tool?** Yes/No
3. **How satisfied are you with your PSA/PPM tool(s)?** Very Satisfied, Satisfied, NA, Dissatisfied, Very Dissatisfied
4. **If you have a PSA or PPM tool what functions are you using it for? Check all that apply.** Sales and Opportunity Management, Project Management, Resource Management, Time Management, Expense Management, Knowledge Management, Financial Management, Reporting and Dashboard, or We do not have an automation tool
5. **How satisfied are you with the Resource Management functionality of your PSA/PPM tool?** Very Satisfied, Satisfied, NA, Dissatisfied, Very Dissatisfied
6. **How many resources do you manage with your PSA/PPM tool?** <100, 100-249, 250-499, 500-999, >1000
7. **Is your company still maintaining the use of 'spreadsheets' outside your PSA/PPM tool to assist with the management of resources?** Yes/No

# Type of Organization – All respondents

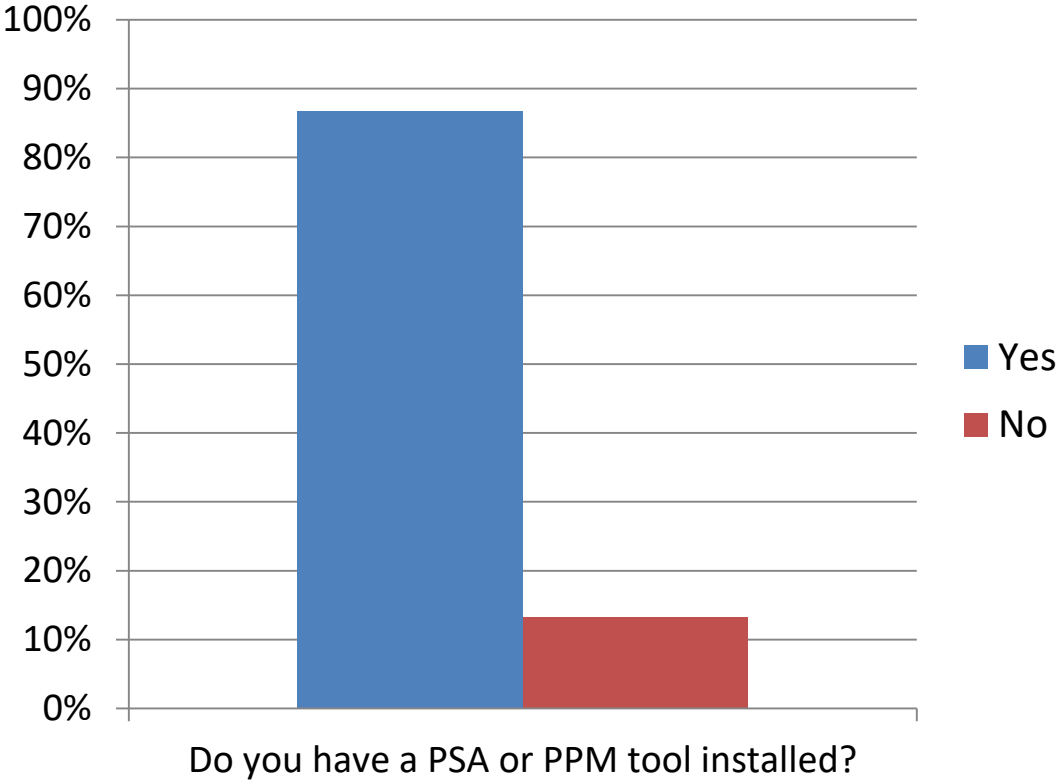
**Enterprise/IT Departments(s) 32%**  
**Professional/Consulting 68%**



# 2 All Respondents

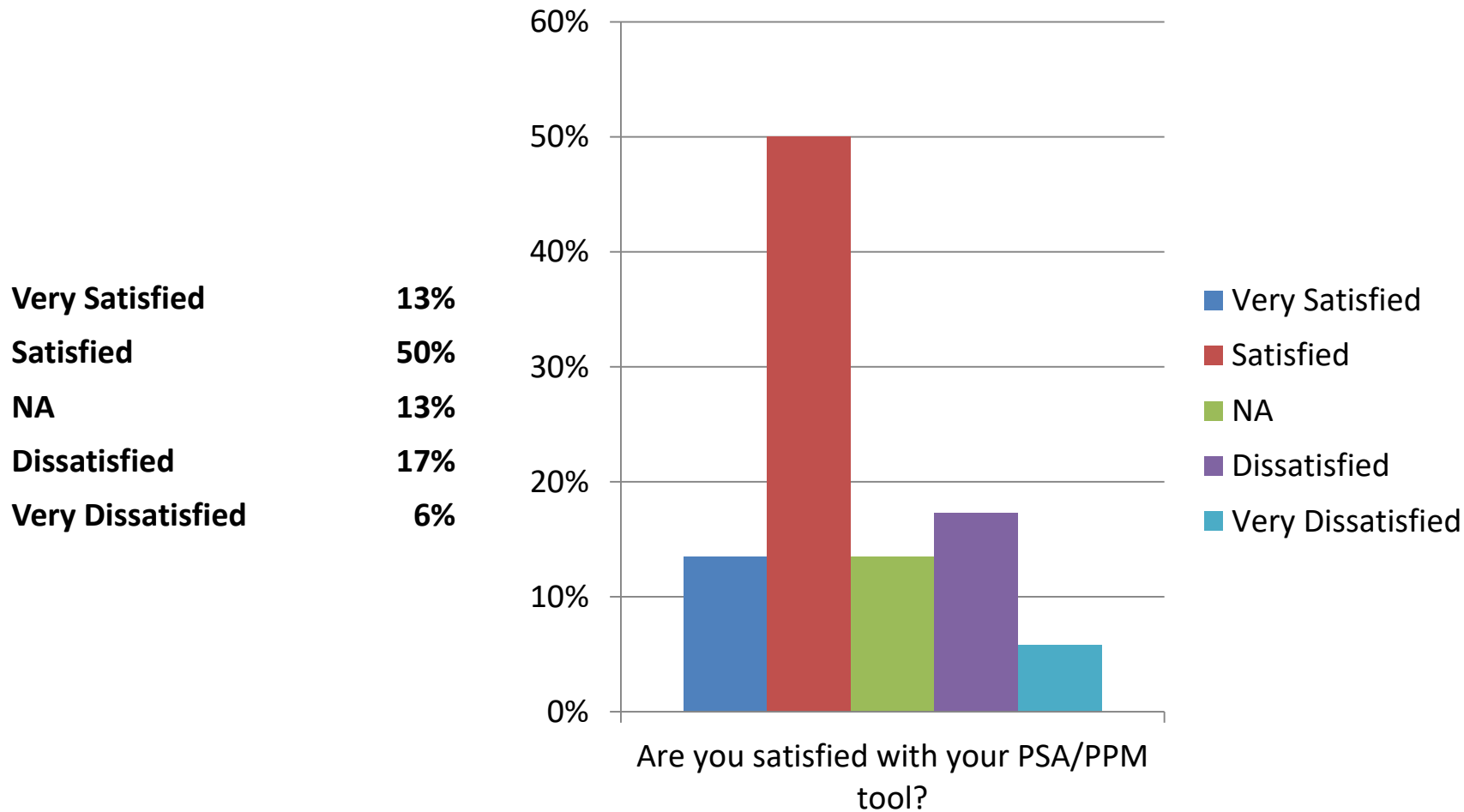
# PSA or PPM tool installed – All respondents

**Yes**      **87%**  
**No**        **13%**



All but the very smallest enterprises (<20 resources) can benefit from a quality PSA/PPM tool.

# Satisfaction of PSA/PPM tool – All respondents

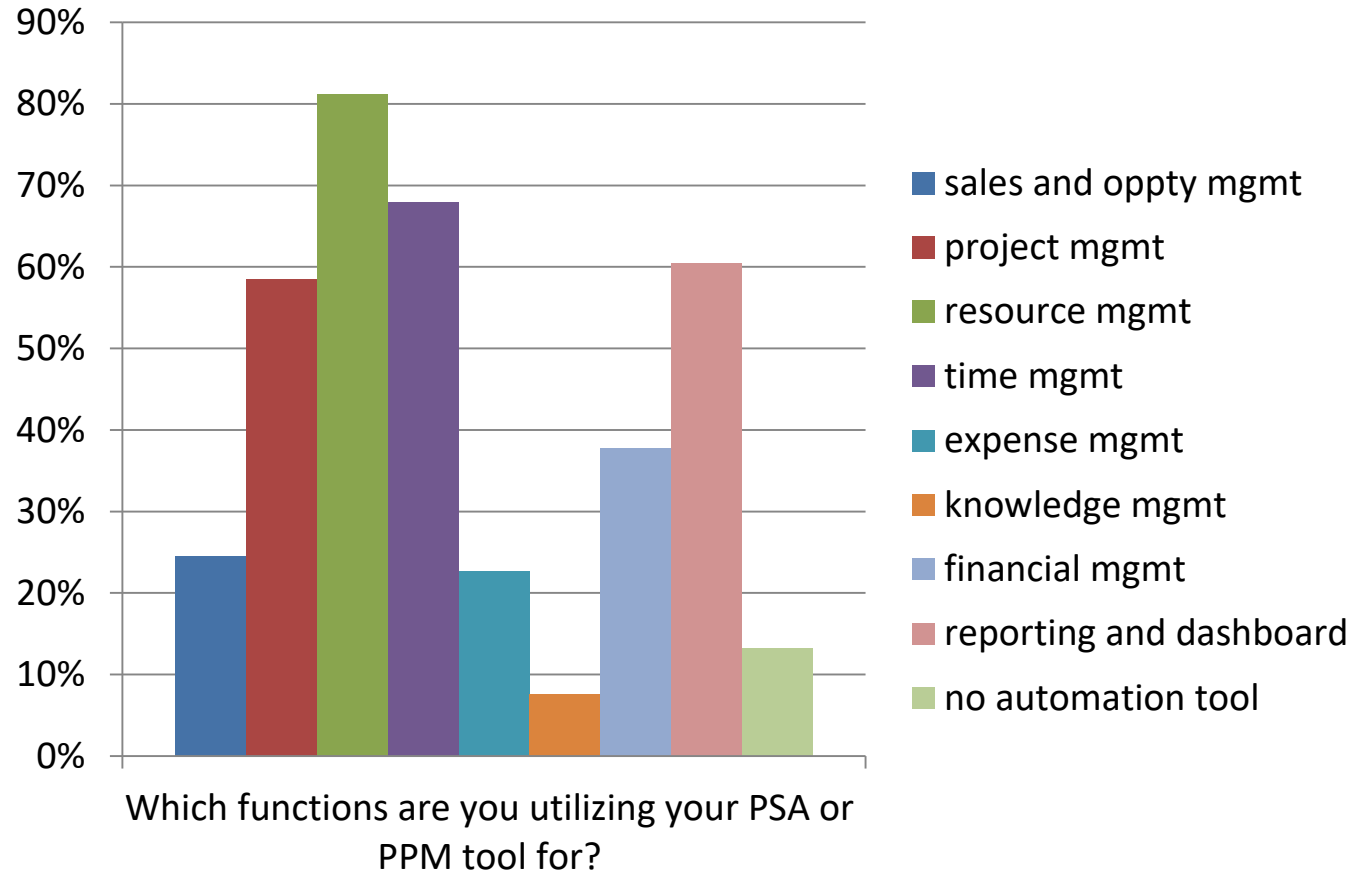


36% of users were either neutral or dissatisfied with their PSA/PPM tool. The RMI has observed this is due to several reasons including poor requirements planning, over dependence on the tool vs. good processes, or a weak PSA/PPM tool.



# Functions – All respondents

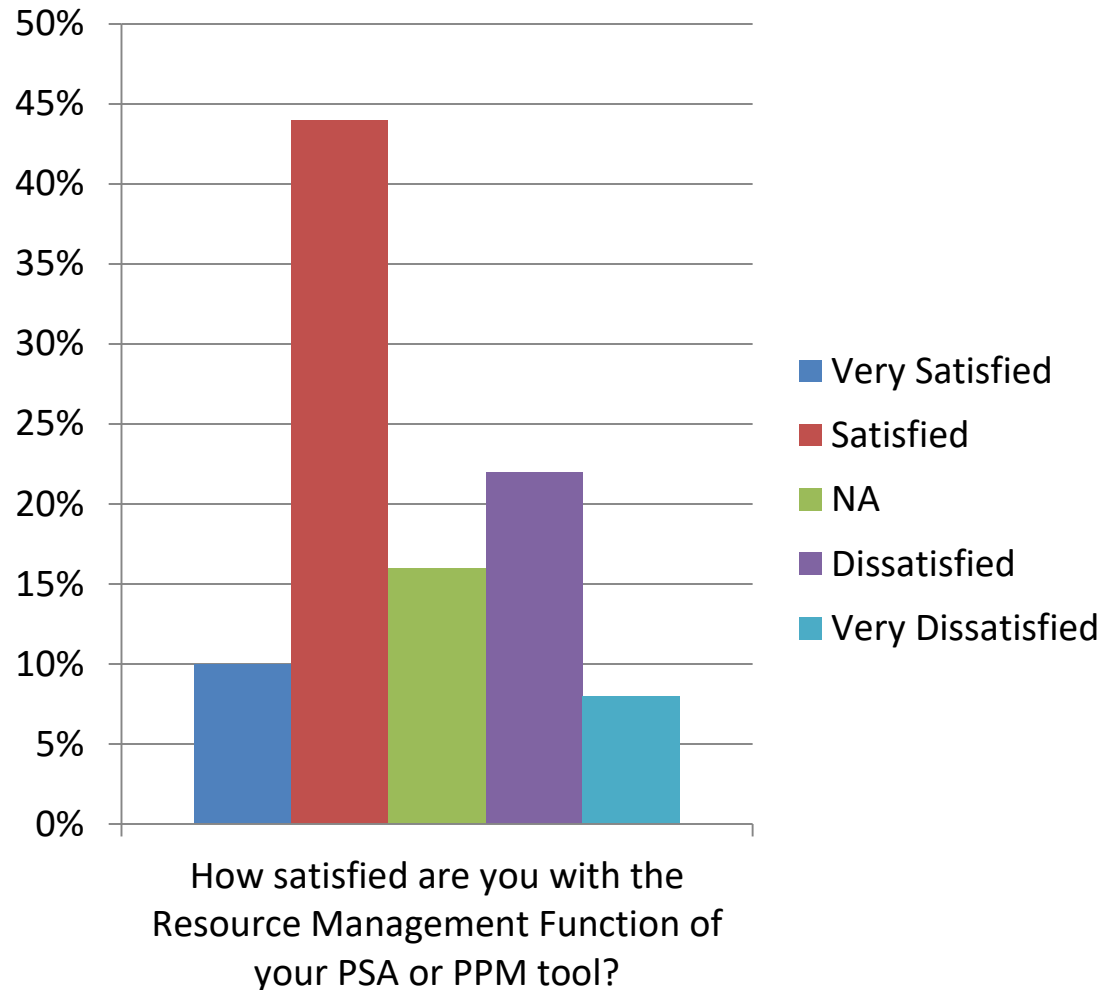
sales and oppty mgmt	25%
project mgmt	58%
resource mgmt	81%
time mgmt	68%
expense mgmt	23%
knowledge mgmt	8%
financial mgmt	38%
reporting and dashboard	60%
no automation tool	13%



Resource Management is the #1 function for PSA/PPM users making this capability an important part of the tool selection process. Industry research supports the fact that most project failures are due to poor resource (vs. project) management making choice of strong RM capabilities mission critical.

# Satisfaction with RM functionality – All respondents

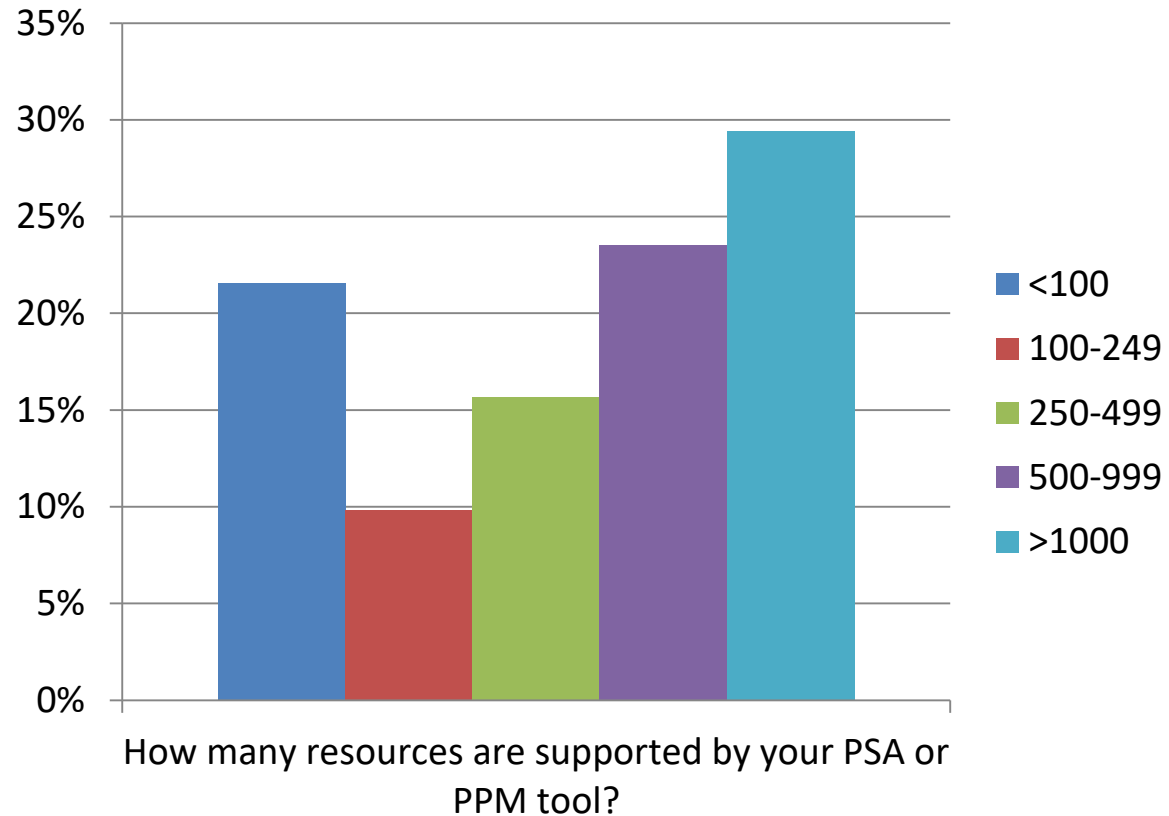
<b>Very Satisfied</b>	<b>10%</b>
<b>Satisfied</b>	<b>44%</b>
<b>NA</b>	<b>16%</b>
<b>Dissatisfied</b>	<b>22%</b>
<b>Very Dissatisfied</b>	<b>8%</b>



46% percent of PSA/PPM users are either neutral or dissatisfied with their tool's functional support for resource management. While vendors have come a long way in RM support capabilities, most have more to do to support a true Just-in-Time Resourcing<sup>®</sup> capability.

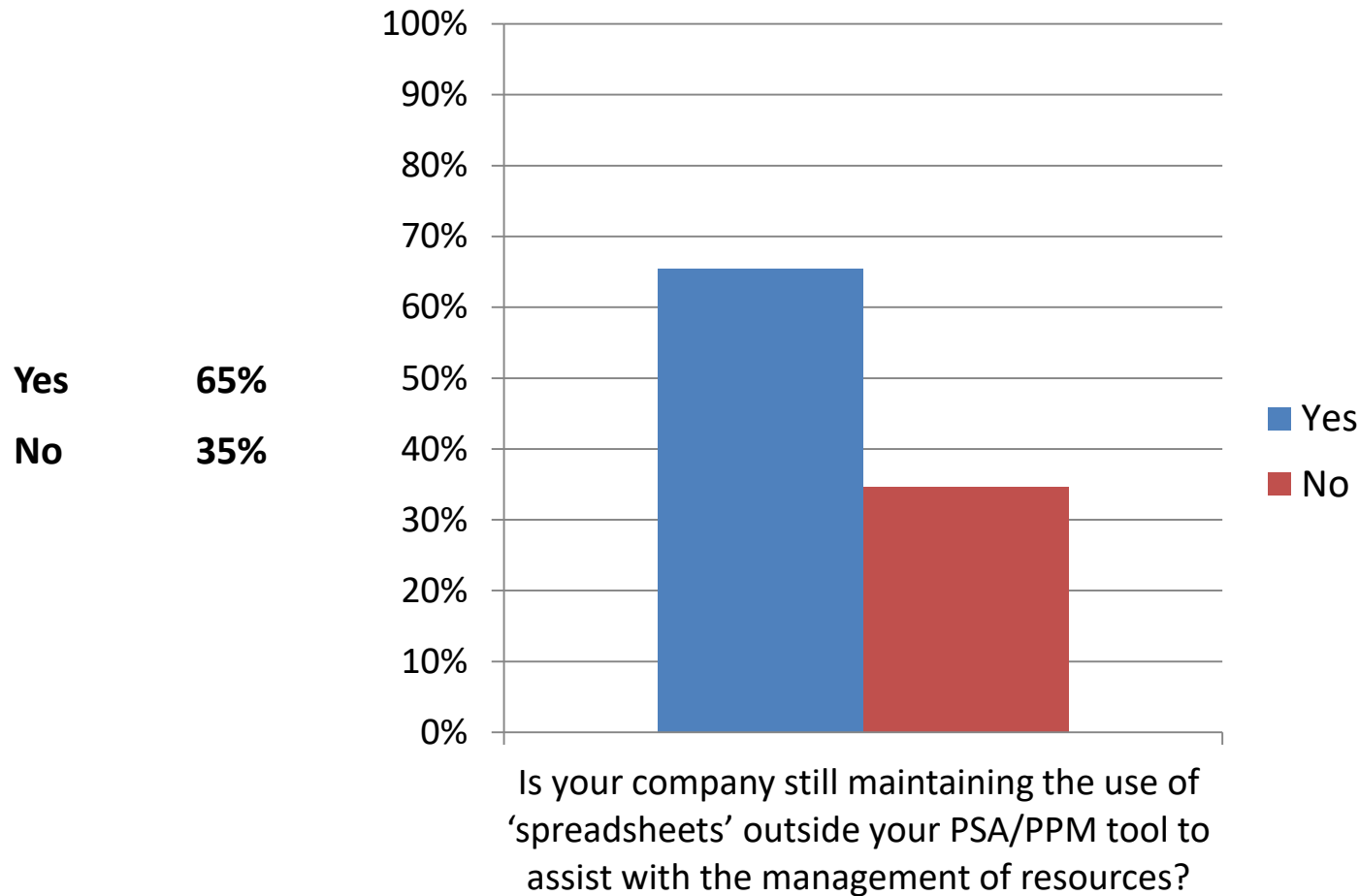
# Number of resources – All respondents

<100	22%
100-249	10%
250-499	16%
500-999	24%
>1000	29%



The larger the resource pool being managed, the greater the need for a strong PSA/PPM tool.

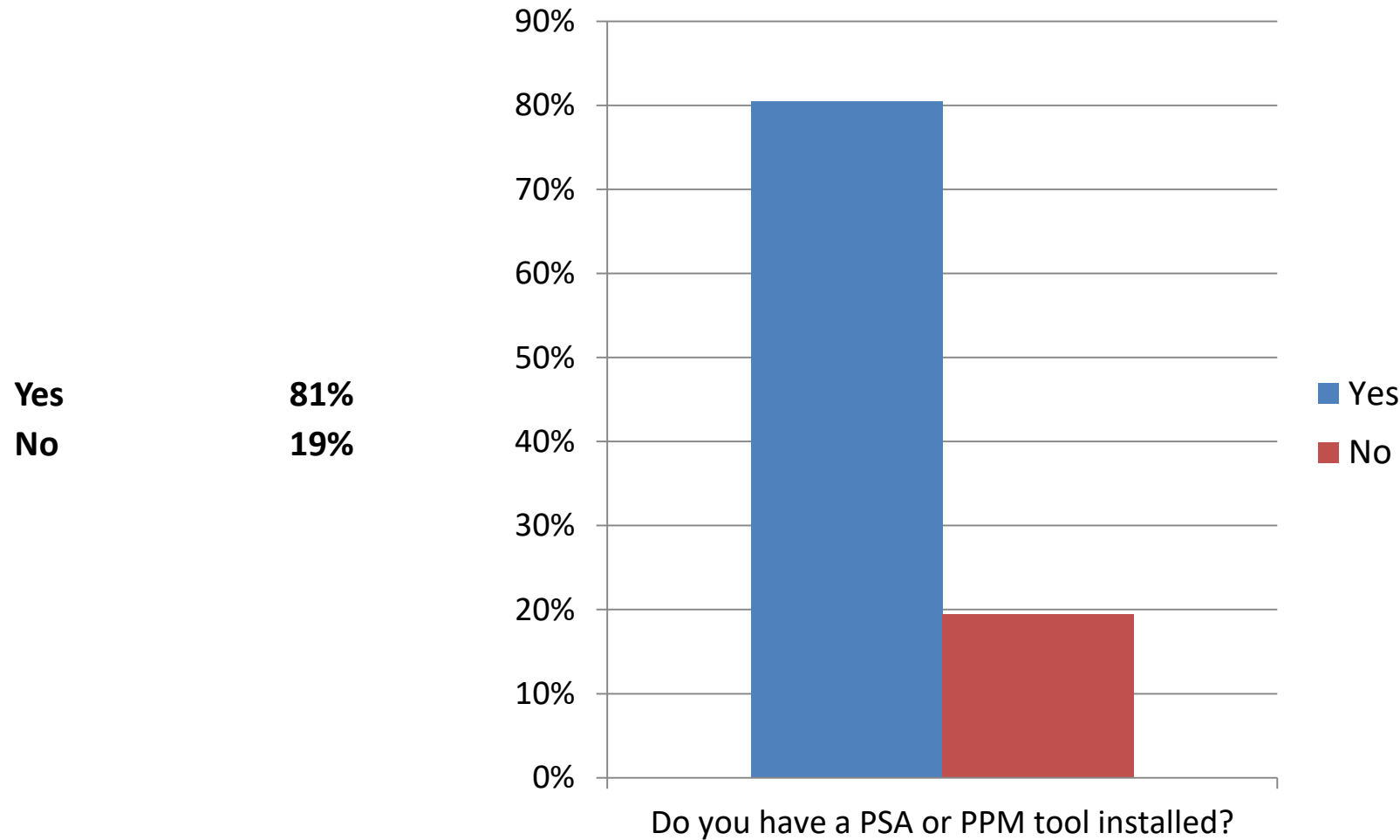
# Use of spreadsheets – All respondents



Interestingly, two thirds of companies still rely on a spreadsheet for Resource Management representing either process deficiencies, tool deficiencies, or both.

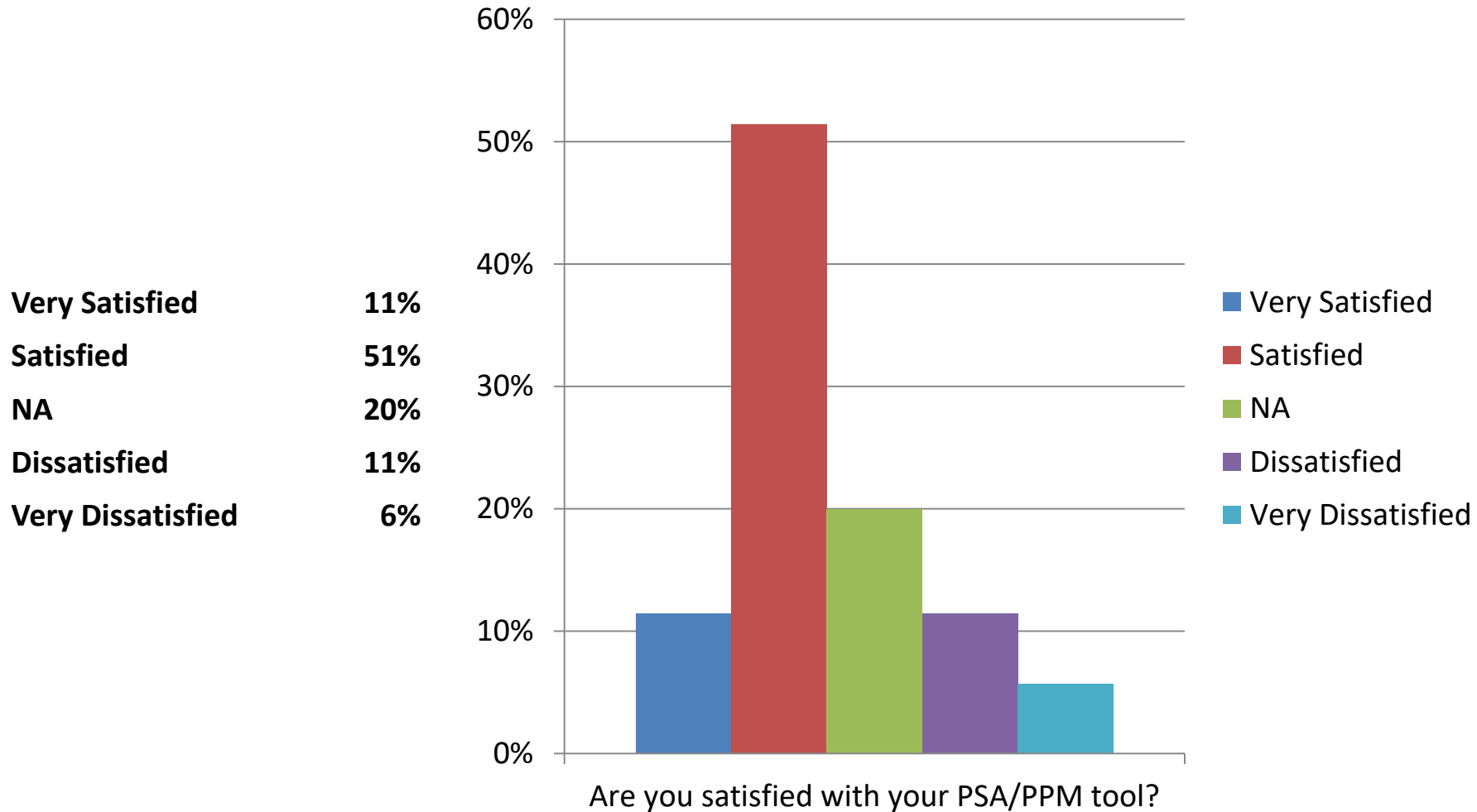
# 3 PS/CS Respondents

# PSA or PPM tool installed – PS/CS respondents



All but the very smallest enterprises (<20 resources) can benefit from a quality PSA/PPM tool.

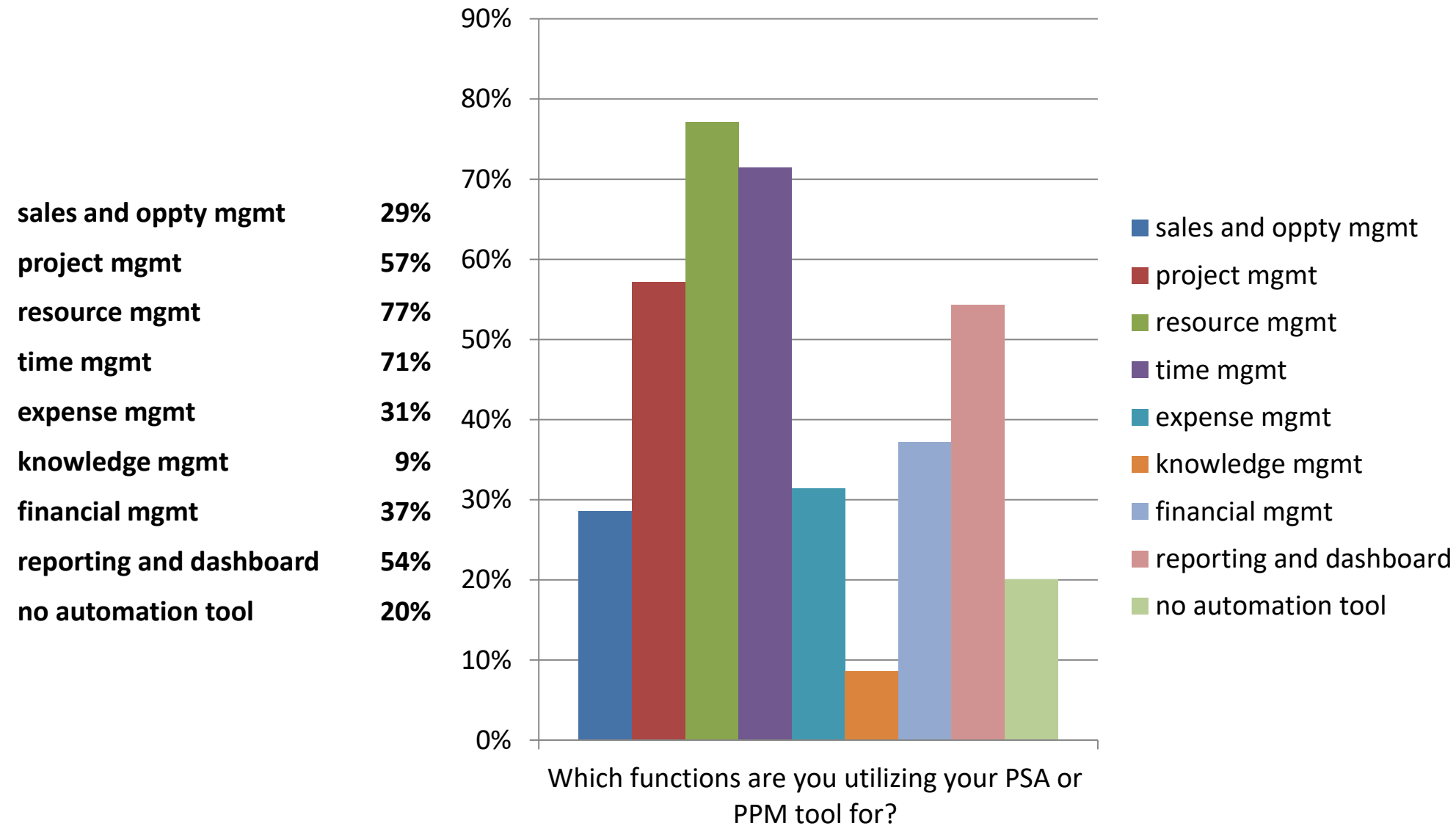
# Satisfaction of PSA/PPM tool – PS/CS respondents



37% of PS/CS users were either neutral or dissatisfied with their PSA/PPM tool.

The RMI has observed this is due to several reasons including poor requirements planning, over dependence on the tool vs. good processes, or a weak PSA/PPM tool.

# Functions – PS/CS respondents

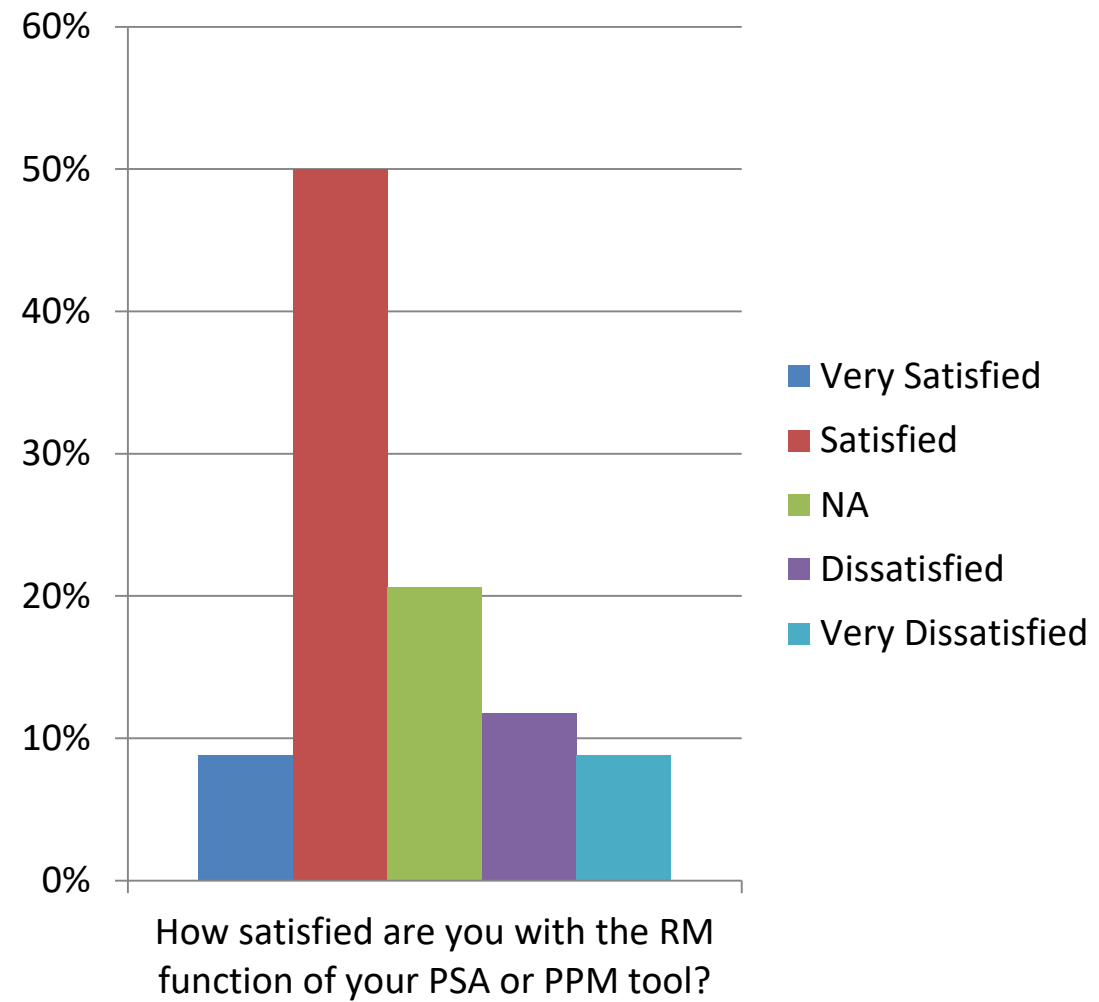


Resource Management is the #1 function for PS/CS users making this capability an important part of the tool selection process. With billable utilization and project performance being highly dependent on strong RM performance, choice of a tool with strong RM functionality is mission critical.



# Satisfaction with RM functionality – PS/CS respondents

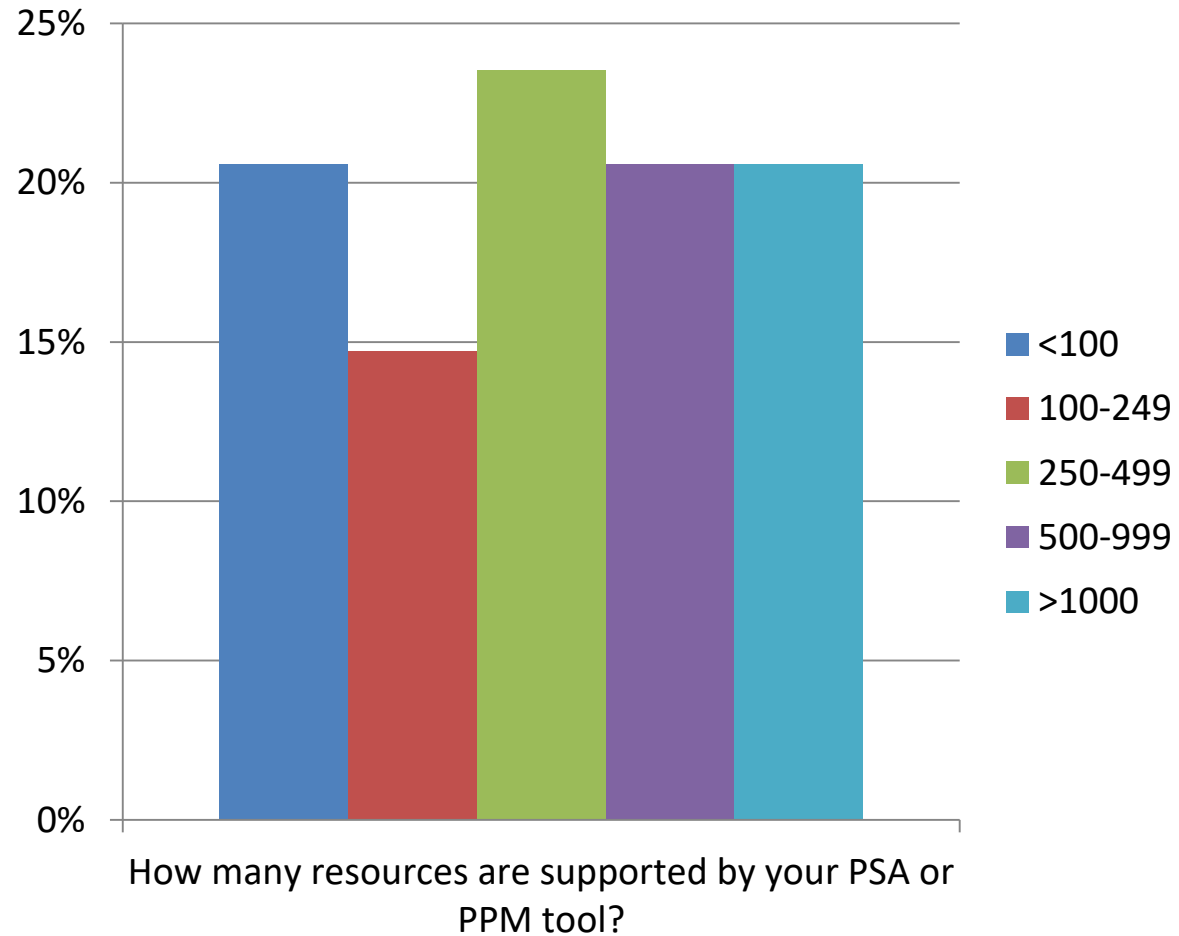
<b>Very Satisfied</b>	<b>9%</b>
<b>Satisfied</b>	<b>50%</b>
<b>NA</b>	<b>21%</b>
<b>Dissatisfied</b>	<b>12%</b>
<b>Very Dissatisfied</b>	<b>9%</b>



42% percent of PSA/PPM users are either neutral or dissatisfied with their tool’s functional support for Resource Management. This represents an opportunity for both users and vendors of RM capabilities to support true Just-in-Time Resourcing<sup>®</sup> capabilities.

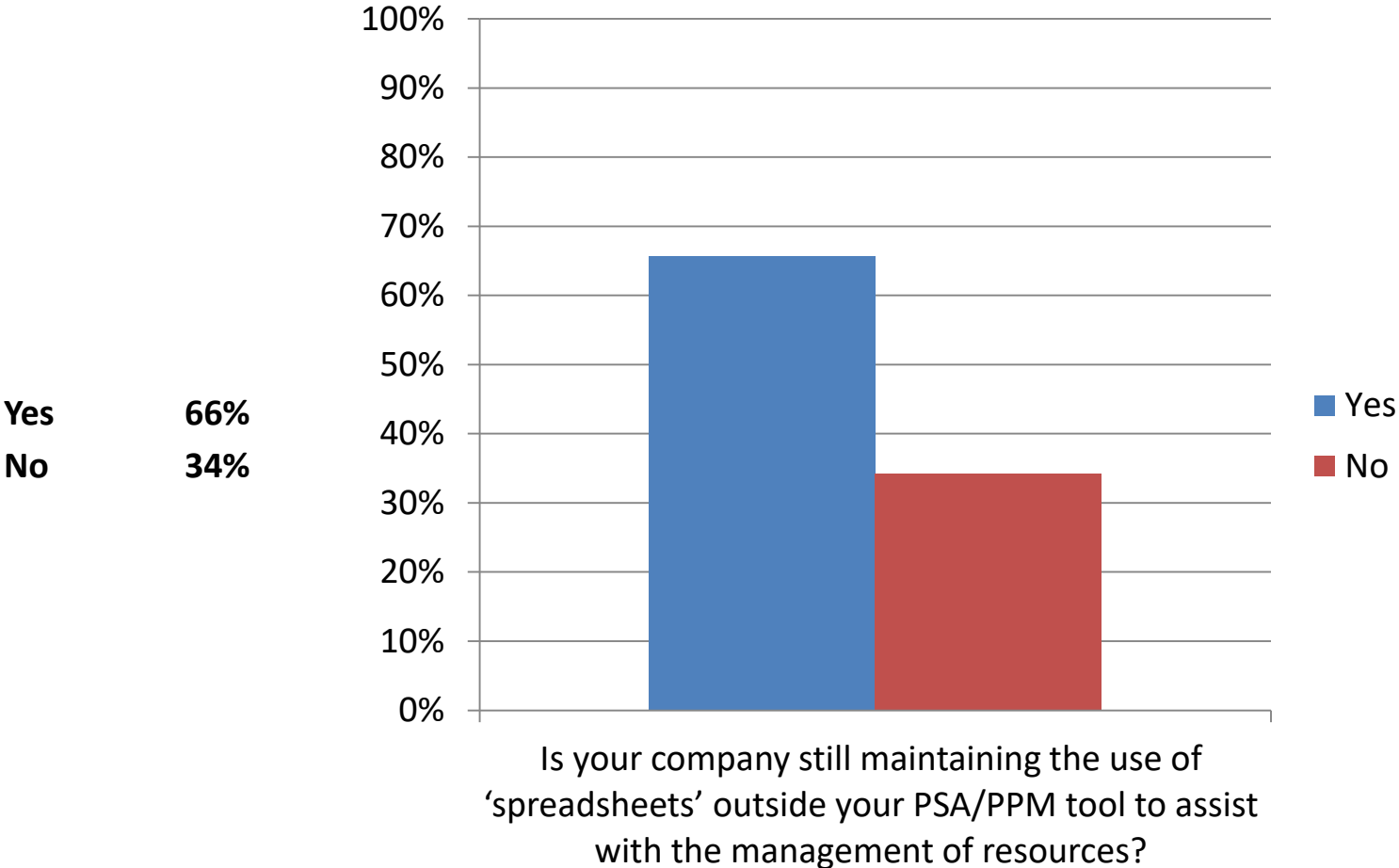
# Number of resources – PS/CS respondents

<b>&lt;100</b>	<b>21%</b>
<b>100-249</b>	<b>15%</b>
<b>250-499</b>	<b>24%</b>
<b>500-999</b>	<b>21%</b>
<b>&gt;1000</b>	<b>21%</b>



The use of PSA or PPM tools is independent of the high number or low number of resources supported by the tool.

# Use of spreadsheets – PS/CS respondents

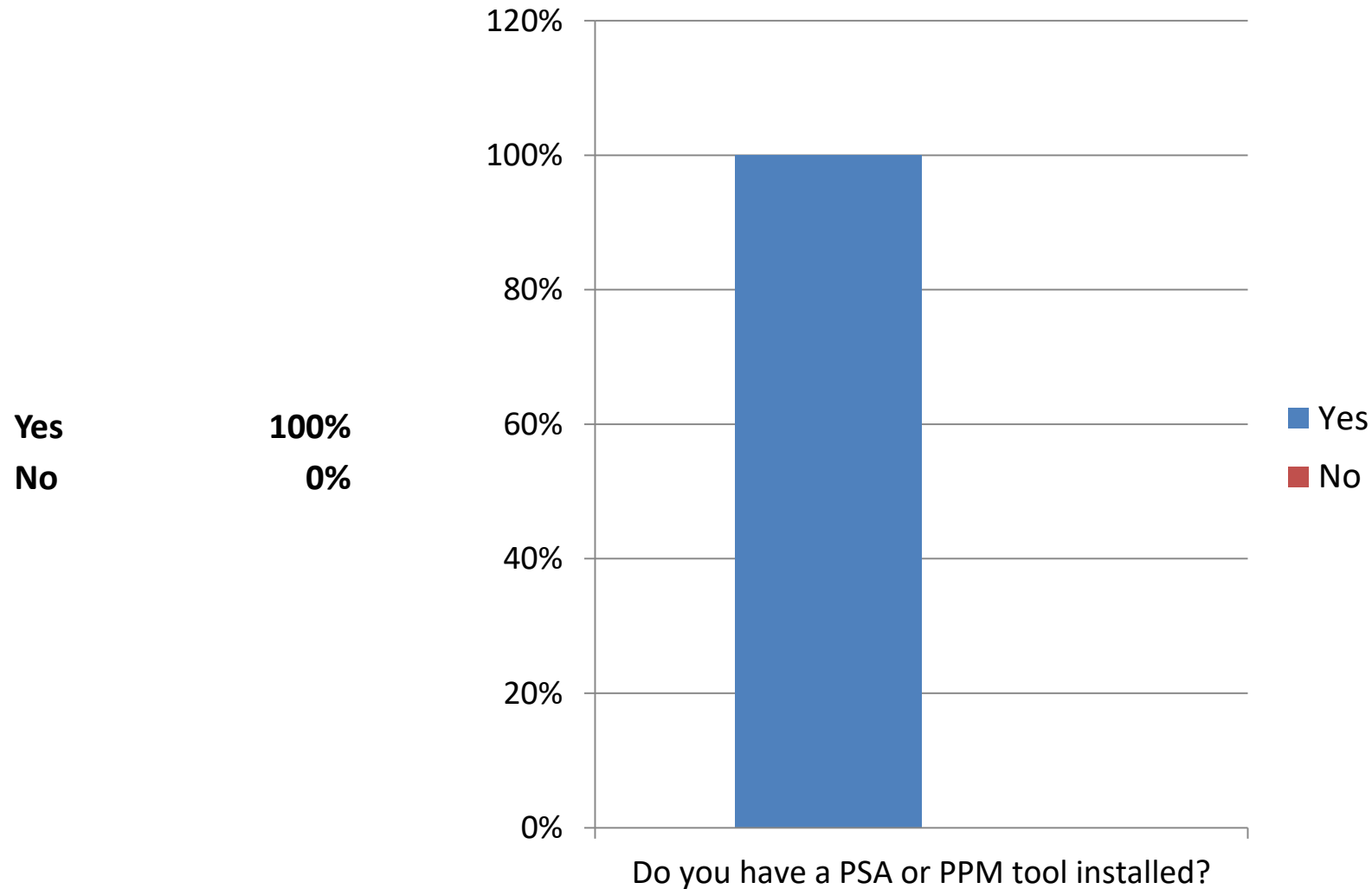


Interestingly, two thirds of companies still rely on a spreadsheet for Resource Management representing either process deficiencies, tool deficiencies, or both. The RMI has found that the right combination of process and technology (PSA/PPM) can minimize or eliminate the need for supporting spreadsheets.

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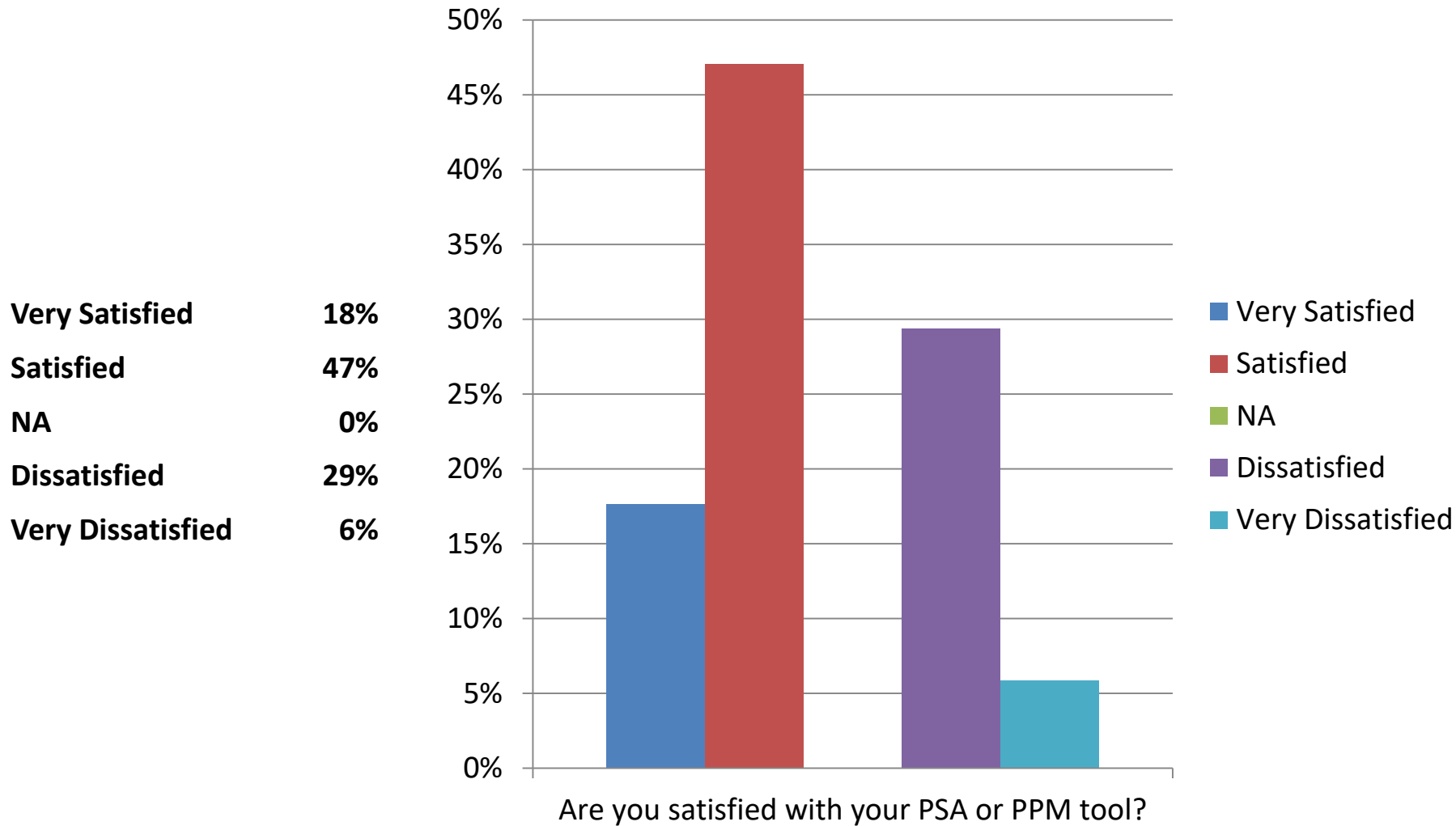
## Enterprise/IT Respondents

# PSA or PPM tool installed – Enterprise/IT respondents



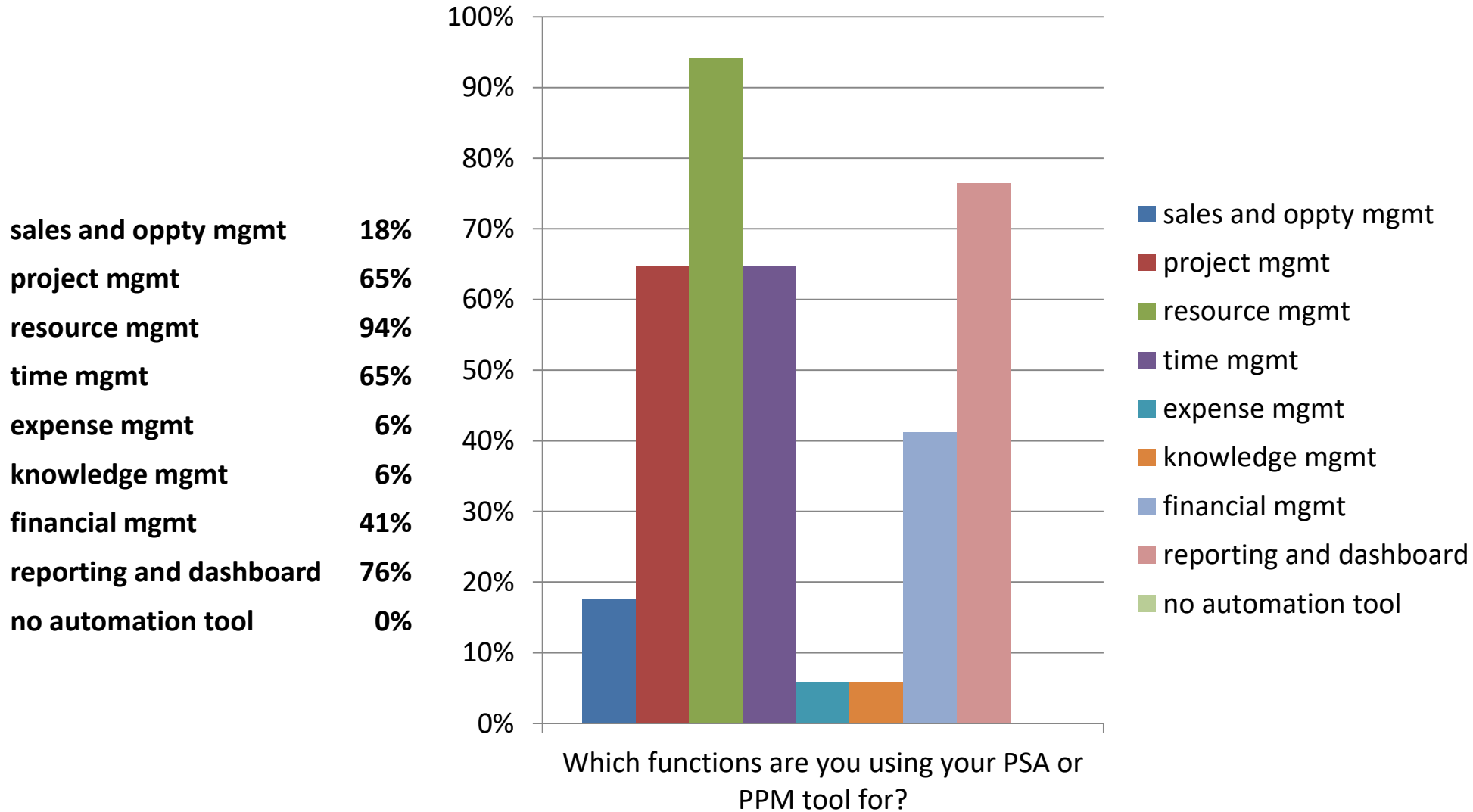
Not surprisingly, with the PPM market being more mature than the PSA market, and more Enterprise/IT users choosing a PPM tool, every respondent has a PSA or PPM tool deployed.

# Satisfaction of PSA/PPM tool – Enterprise/IT



35% of Enterprise/IT users were dissatisfied with their PSA/PPM tool. The RMI has observed this is due to several reasons including poor requirements planning, over dependence on the tool vs. good processes, or a weak PSA/PPM tool.

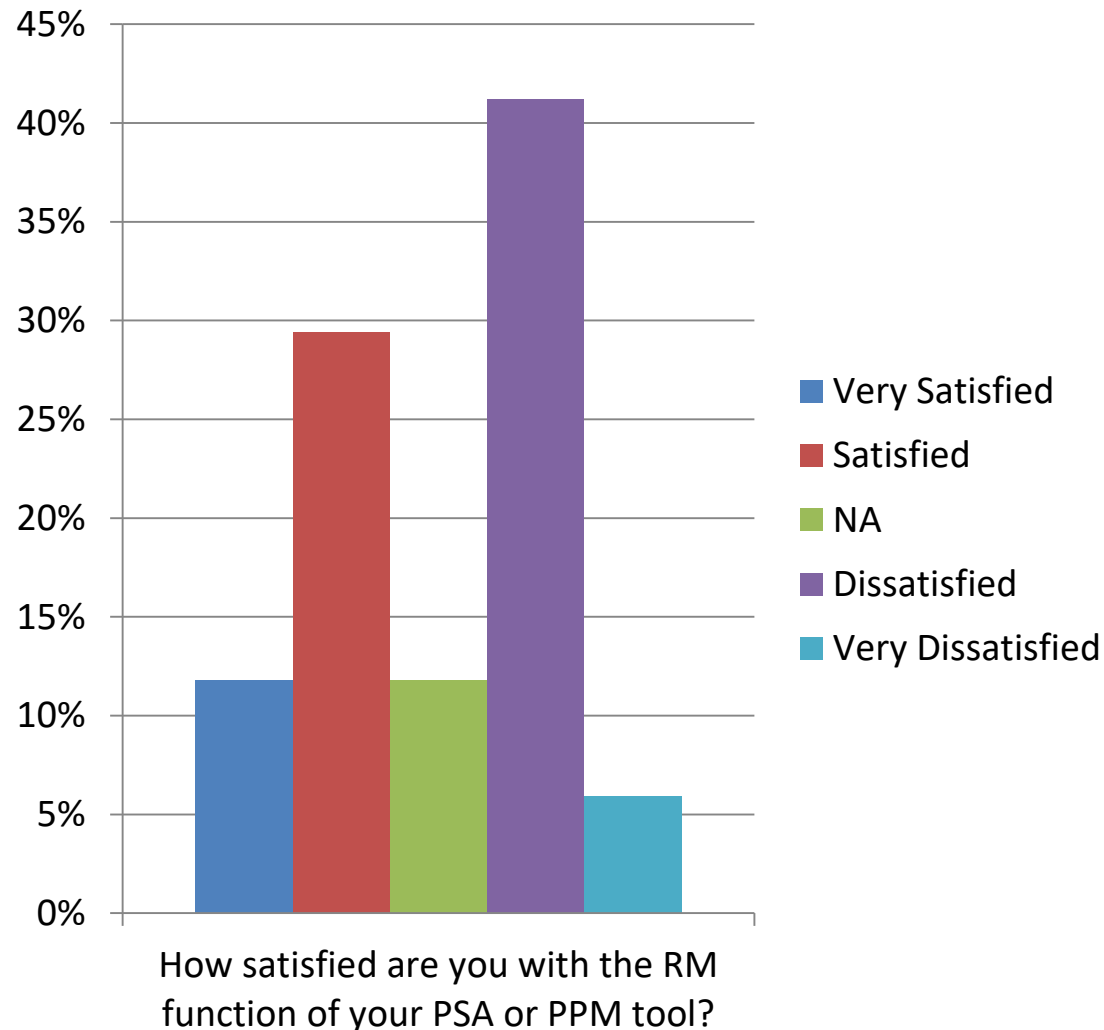
# Functions – Enterprise/IT respondents



Enterprise/IT users are most dependent on PSA/PPM tools for Resource Management support. With project performance and adapting to new Agile needs being highly dependent on strong RM performance, choice of a tool with strong RM functionality is mission critical.

# Satisfaction w/RM functionality – Enterprise/IT respondents

<b>Very Satisfied</b>	<b>12%</b>
<b>Satisfied</b>	<b>29%</b>
<b>NA</b>	<b>12%</b>
<b>Dissatisfied</b>	<b>41%</b>
<b>Very Dissatisfied</b>	<b>6%</b>

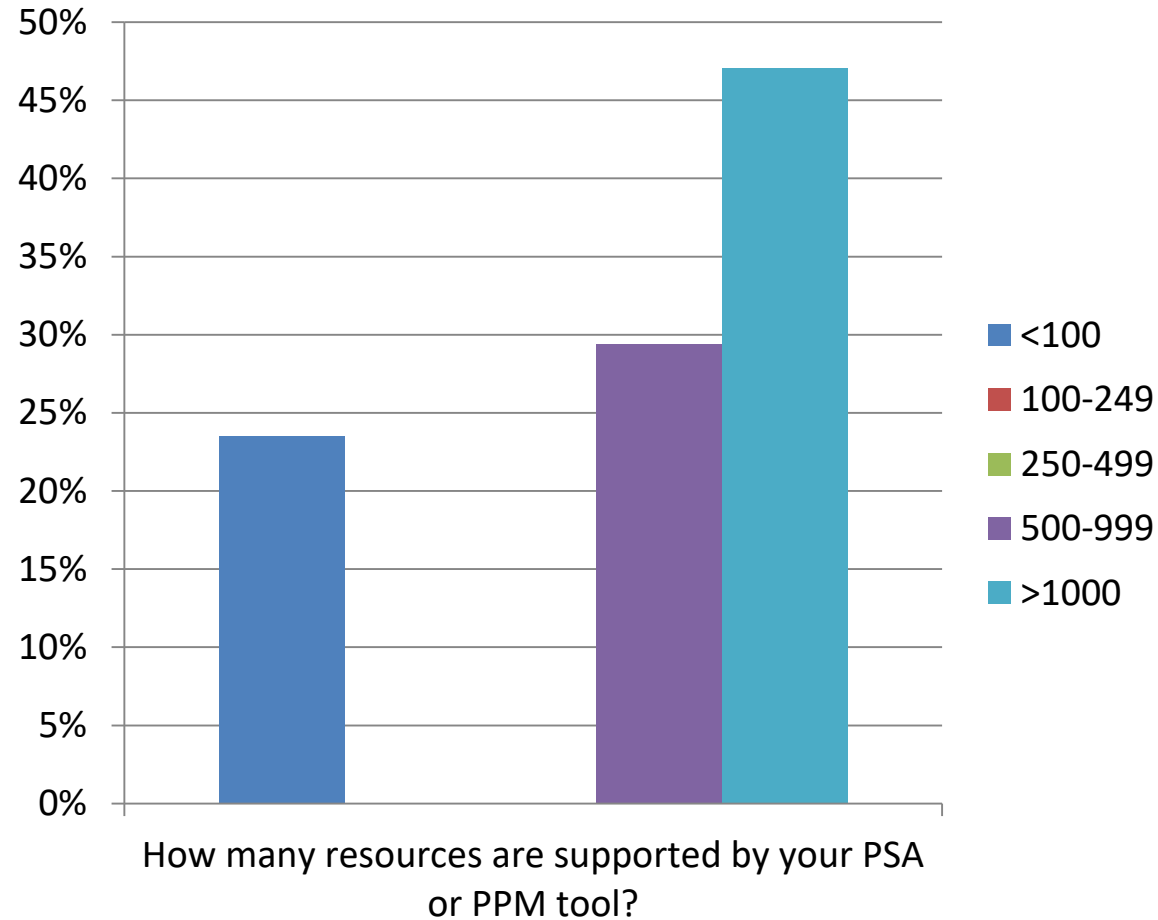


59% percent of Enterprise/IT users are either neutral or dissatisfied with their tool's functional support for Resource Management. The RMI has observed that all too often these users expect the tool to do the RM work. Reality is that a good process is needed along with a quality tool that properly enables the process. RMI experience with a wide range of PSA/PPM tools is that PPM tools in general are less matured in RM functionality than PSA tools. The stronger PPM providers are working hard to address this need and some early leaders have emerged.



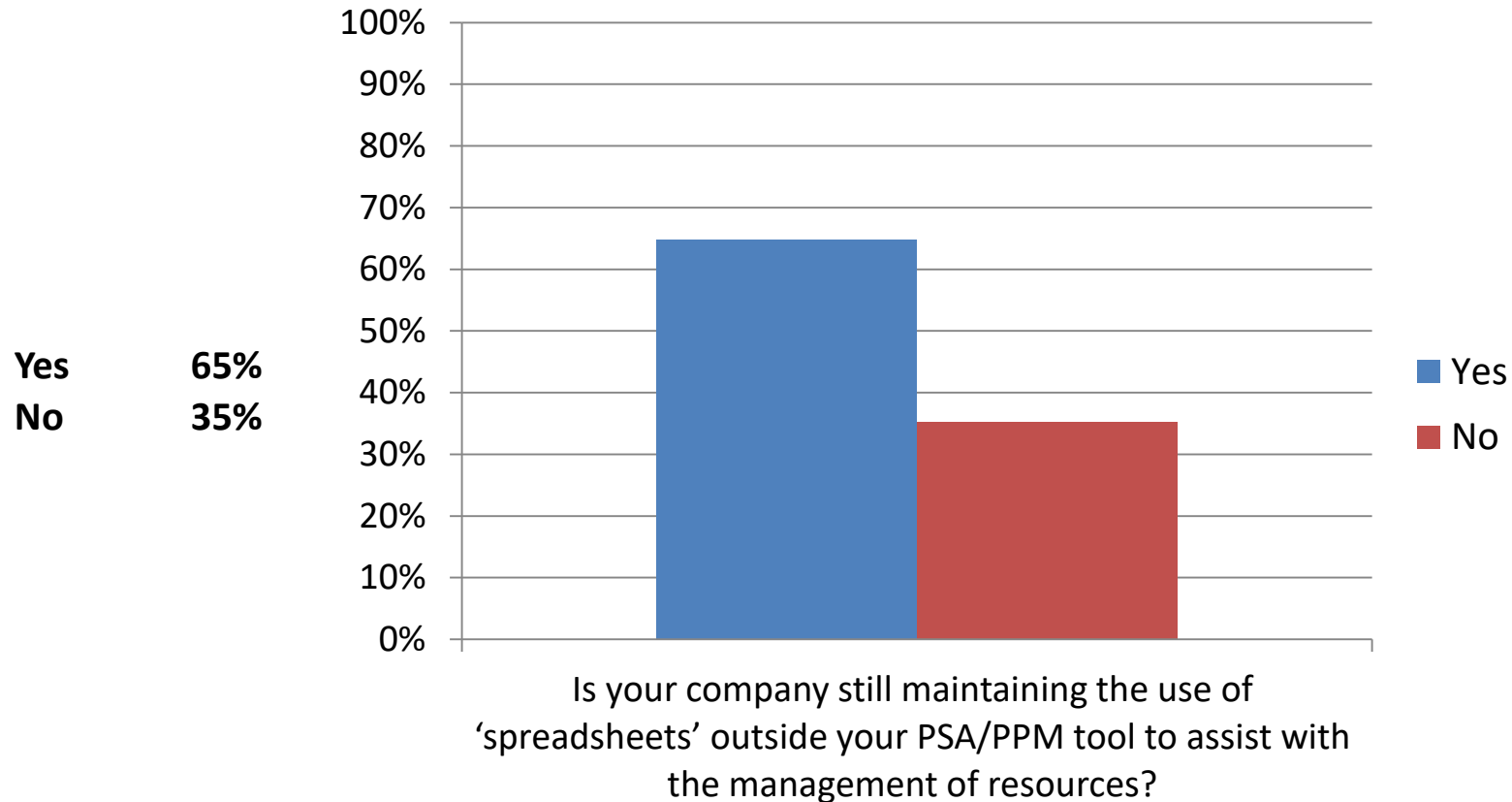
# Number of resources – Enterprise/IT respondents

<b>&lt;100</b>	<b>24%</b>
<b>100-249</b>	<b>0%</b>
<b>250-499</b>	<b>0%</b>
<b>500-999</b>	<b>29%</b>
<b>&gt;1000</b>	<b>47%</b>



The use of PSA or PPM tools is independent of the high number or low number of resources supported by the tool.

# Use of spreadsheets – Enterprise/IT respondents



Even a more mature market still has dependencies on spreadsheets for Resource Management representing either process deficiencies, tool deficiencies, or both. The RMI has found that the right combination of process and technology (PSA/PPM) can minimize or eliminate the need for supporting spreadsheets.

# Automation Tools Survey Summary

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- ✓ PSA/PPM tools are a necessity for any organization with >20 resources being managed
- ✓ Users need to focus more on RM process definition and requirements planning before selecting an automation tool
- ✓ Vendors need to improve RM functionality with more focus on process support

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