Resource Management Survey Series:

Automation Tools Survey

Thanks to Our Sponsor:
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%
All Respondents
PSA or PPM tool installed – All respondents

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

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

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® capability.

Very Satisfied 10%
Satisfied 44%
NA 16%
Dissatisfied 22%
Very Dissatisfied 8%

How satisfied are you with the Resource Management Function of your PSA or PPM tool?

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

Number of resources – All respondents

<table>
<thead>
<tr>
<th>Resource Pool</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>&lt;100</td>
<td>22%</td>
</tr>
<tr>
<td>100-249</td>
<td>10%</td>
</tr>
<tr>
<td>250-499</td>
<td>16%</td>
</tr>
<tr>
<td>500-999</td>
<td>24%</td>
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<tr>
<td>&gt;1000</td>
<td>29%</td>
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</tbody>
</table>
Interestingly, two thirds of companies still rely on a spreadsheet for Resource Management representing either process deficiencies, tool deficiencies, or both.
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.
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.

- sales and oppty mgmt: 29%
- project mgmt: 57%
- resource mgmt: 77%
- time mgmt: 71%
- expense mgmt: 31%
- knowledge mgmt: 9%
- financial mgmt: 37%
- reporting and dashboard: 54%
- no automation tool: 20%

Which functions are you utilizing your PSA or PPM tool for?
Satisfaction with RM functionality – PS/CS respondents

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® capabilities.

How satisfied are you with the RM function of your PSA or PPM tool?

- Very Satisfied: 9%
- Satisfied: 50%
- NA: 21%
- Dissatisfied: 12%
- Very Dissatisfied: 9%

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

Use of spreadsheets – PS/CS respondents

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<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>66%</td>
<td>34%</td>
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Is your company still maintaining the use of ‘spreadsheets’ outside your PSA/PPM tool to assist with the management of resources?
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.
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.
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.

<table>
<thead>
<tr>
<th>Function</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>sales and oppty mgmt</td>
<td>18%</td>
</tr>
<tr>
<td>project mgmt</td>
<td>65%</td>
</tr>
<tr>
<td>resource mgmt</td>
<td>94%</td>
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<tr>
<td>time mgmt</td>
<td>65%</td>
</tr>
<tr>
<td>expense mgmt</td>
<td>6%</td>
</tr>
<tr>
<td>knowledge mgmt</td>
<td>6%</td>
</tr>
<tr>
<td>financial mgmt</td>
<td>41%</td>
</tr>
<tr>
<td>reporting and dashboard</td>
<td>76%</td>
</tr>
<tr>
<td>no automation tool</td>
<td>0%</td>
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</table>
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.
The use of PSA or PPM tools is independent of the high number or low number of resources supported by the tool.

Number of resources – Enterprise/IT respondents

<table>
<thead>
<tr>
<th>Number of Resources</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>&lt;100</td>
<td>24%</td>
</tr>
<tr>
<td>100-249</td>
<td>0%</td>
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<tr>
<td>250-499</td>
<td>0%</td>
</tr>
<tr>
<td>500-999</td>
<td>29%</td>
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<tr>
<td>&gt;1000</td>
<td>47%</td>
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</tbody>
</table>
Use of spreadsheets – Enterprise/IT respondents

<table>
<thead>
<tr>
<th>Yes</th>
<th>65%</th>
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<tbody>
<tr>
<td>No</td>
<td>35%</td>
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</tbody>
</table>

Is your company still maintaining the use of ‘spreadsheets’ outside your PSA/PPM tool to assist with the management of resources?

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

✓ 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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