

Resource Management Maturity: Self-serve assessment



The first step to gaining value from resource management is to assess your current maturity, so you know where you need to go next.

How to use: Check the box for each statement that applies to your firm. If you have checked every box in a stage across both people and processes, and software, congratulations! You have achieved that maturity stage. In stages where you've checked some but not all boxes, this gives you an indication of the areas that need the most attention for your resource management transformation.

	People and processes		Software	
Stage 1 <i>Reactive</i> An administrative, reactive, and mostly inefficient process or function.	<input type="checkbox"/>	Reactive and manual work allocation with no documented processes or controls	<input type="checkbox"/>	Scheduling with spreadsheets
	<input type="checkbox"/>	Scheduling done by fee-earners in delivery teams, or admin roles	<input type="checkbox"/>	Limited to no reporting on utilization or other resource management metrics
	<input type="checkbox"/>	No usable skills database for matching jobs to staff		
Stage 2 <i>Foundational</i> An operational business function with some consideration of best practices and improving efficiencies.	<input type="checkbox"/>	Processes exist but are ad-hoc across multiple systems	<input type="checkbox"/>	Scheduling within a larger ERP, PSA, or practice management software, alongside the use of spreadsheets
	<input type="checkbox"/>	Fee earners spend a lot of time scheduling	<input type="checkbox"/>	Project budgets are not integrated with (and therefore hard to consider when) scheduling
	<input type="checkbox"/>	Resources are sometimes shared but "belong" to the team, not the firm	<input type="checkbox"/>	Manual spreadsheet-based reporting on core metrics
	<input type="checkbox"/>	If a resource manager or scheduler is in place, they are in an admin or support role to the client managers		
Stage 3 <i>Formalized</i> An established business function with inconsistent processes and moderate attention on improving efficiencies.	<input type="checkbox"/>	Resourcing processes are fully documented	<input type="checkbox"/>	Dedicated, resource management software in addition to other practice management technology
		Dedicated resource managers carry out scheduling, not client teams		Engagement financials through practice management or PSA but are not integrated with scheduling; e.g., hard to track budgets to actuals
	<input type="checkbox"/>	Resources are sometimes shared across the firm, but it's not standard practice	<input type="checkbox"/>	Reporting available but clunky and hard to manipulate or export
		Skills database is centralized		
Stage 4 <i>Centralized</i> An important business function contributing significant, consistent, and proactive value across the firm.	<input type="checkbox"/>	Processes are documented and monitored for compliance		Dedicated, modern resource management software with AI and automated staffing capabilities
		Dedicated, objective resource managers whose roles encompass more than just scheduling		Experimenting with AI or automation to increase efficiencies and make optimal resourcing decisions
	<input type="checkbox"/>	Centralized resource sharing across service lines and/or locations		Integrations from ERP or practice management are in place for skills, projects, financials etc
	<input type="checkbox"/>	Resources "belong" to the firm, not specific teams		Single system used for resource management processes and reporting, with automation and export functionality
	<input type="checkbox"/>	Skills database is centralized, housed in software, and used to assign work to the most suitable resources		
Stage 5 <i>Strategic</i> A strategic business function aligned to organizational goals delivering a substantial competitive advantage to the firm.	<input type="checkbox"/>	Strategic, firm-wide Resource Management Office (RMO) with representation at the leadership table and interlocked with other departments		Dedicated, modern resource management software with AI/automation contributing heavily to scheduling, with minimal manual reviews/approvals
	<input type="checkbox"/>	Dedicated resource managers using AI and/or automation to fully optimize the workforce for efficiency, utilization, and client/employee outcomes		Integrated best-of-breed and ERP systems for an optimal, seamless "all-in-one" solution
	<input type="checkbox"/>	Centralized resourcing; people allocated to work holistically, across service lines and/or locations		Centralized, real-time, granular reporting on organizational metrics, e.g., not only staffing, but supply and demand forecasting, and training and hiring plans
		Skills data is used strategically to manage supply and demand, and develop career and training plans		

To schedule a conversation and see how Dayshape can support your resource management transformation, visit dayshape.com/us/demo