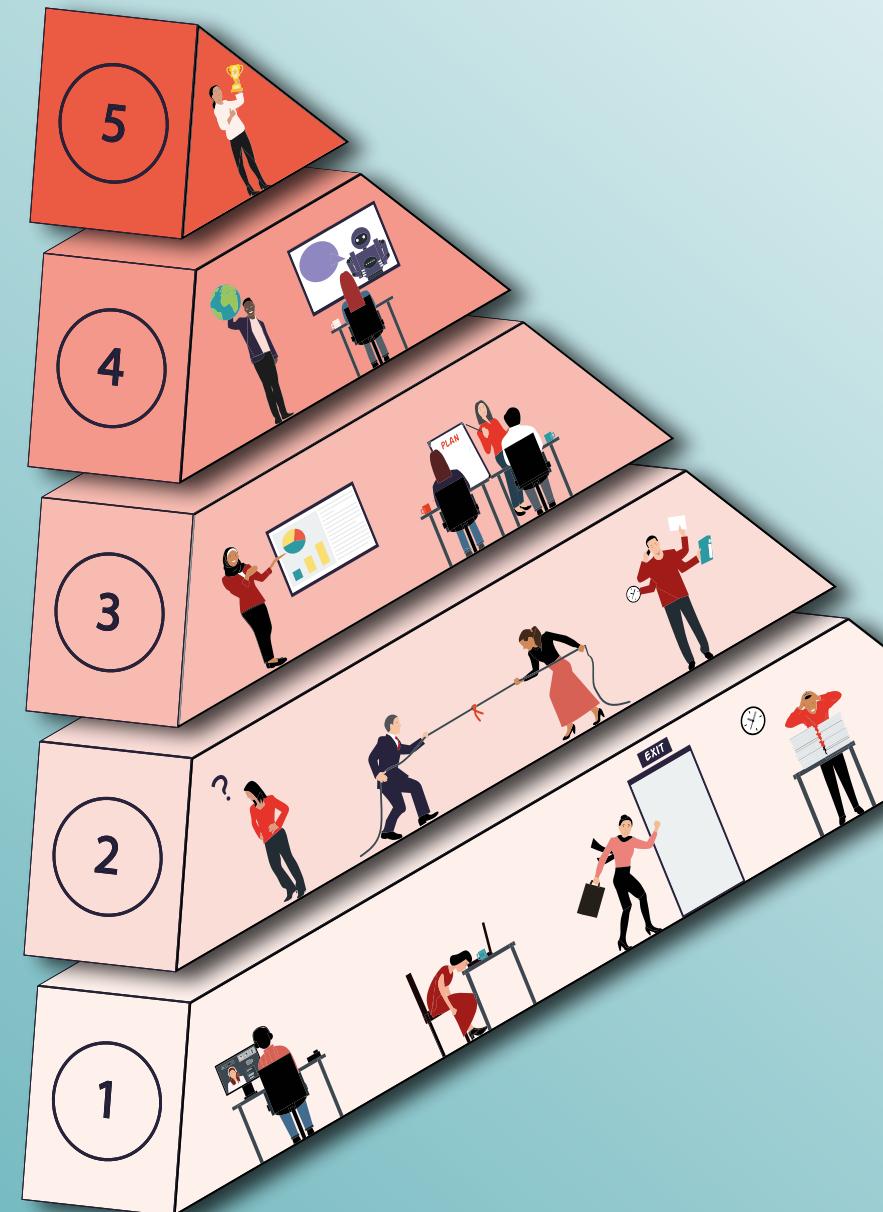


The Resource Management Maturity Guide:

The blueprint to
transform your resource
management

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Re-thinking resource management

Professional services firms need their people; they are the main asset (and expense) of a firm. While there is much discussion on how to improve internal processes and efficiencies related to how your people are deployed, this is often through the tunnelled lens of only increasing utilization and billable time.

Re-thinking resource management is the solution. Resource management is much more than moving people around to fill gaps in a schedule. Maturing your resource management is the overarching strategy that will unlock growth by providing increased efficiencies, optimized workforce allocation, and better client and employee experiences. One of the most critical aspects of your business is connecting your people and your clients together in service of both your firm's and your clients' goals.

Use this guide as your resource management transformation blueprint. It will support your resource management maturity journey through the necessary stages, no matter your starting point. This four-step blueprint will help you to:

1. [Identify and confirm your current stage \(guided by our quiz and checklist assessment\)](#)
2. [Pick your goal stage \(considering benefits and blockers\)](#)
3. [Achieve your goal stage \(with case study examples\)](#), and
4. [Continuously improve your resource management practices](#).

Inspiration

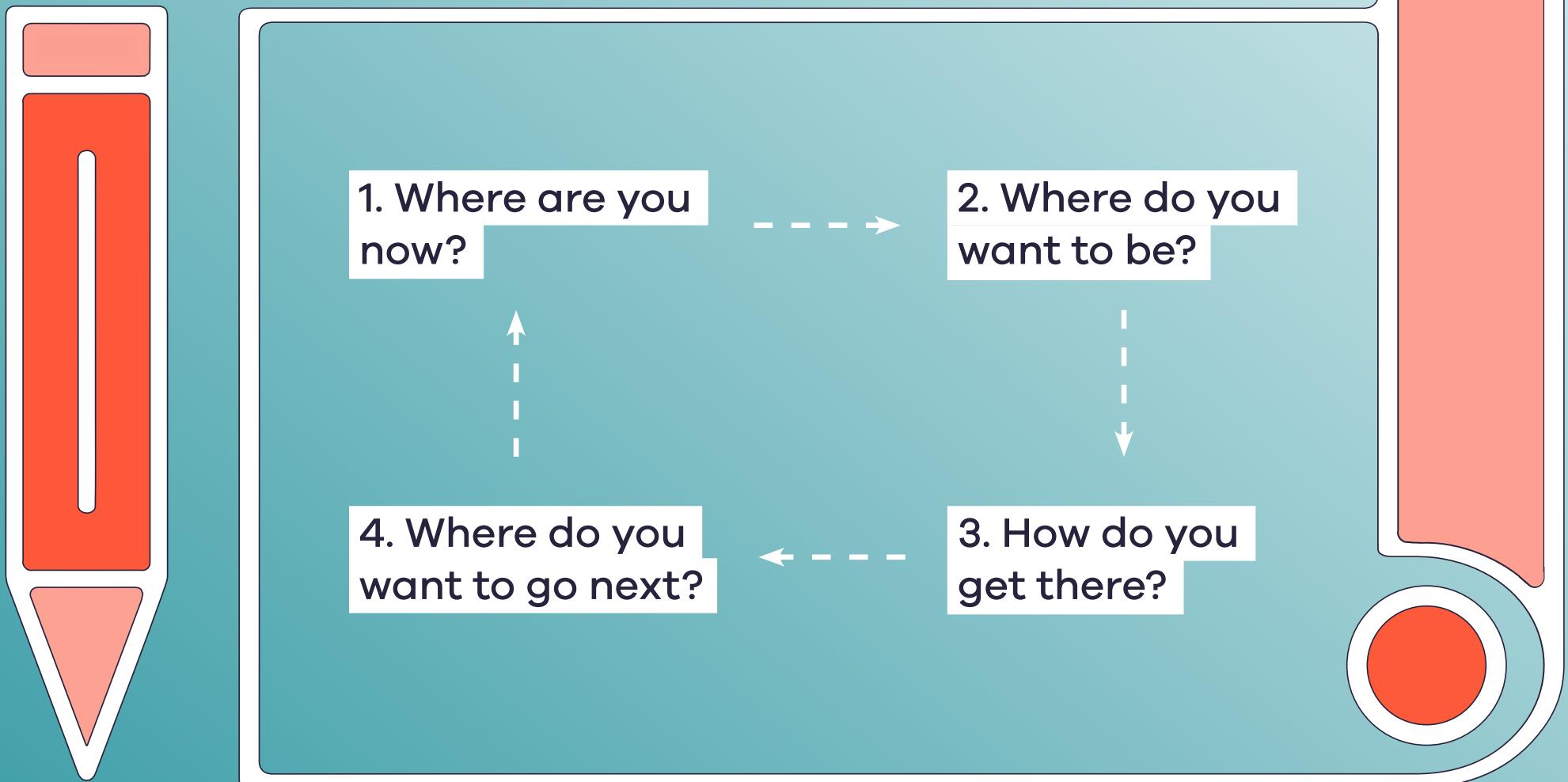


The Resource Management Institute (RMI) is an organization dedicated to thought leadership, best practices, tools, and networking opportunities to help resource and workforce management professionals evolve and better manage their people.

The maturity stages outlined in this guide have been inspired by the [RMI's Resource Management Maturity Model](#). The RMI's model identifies the full scope of resource management as it applies to professional services firms broadly, helping them plot their resource management maturity.

Dayshape is a resource management software provider with over 10 years of experience supporting and developing our software in partnership with our customers, which are among the world's largest and leading professional services firms. We've adapted and built upon RMI's model to create a maturity framework specific to the accounting industry, where most of our customers operate. The Dayshape model considers the key aspects of people and processes, as well as industry-specific software. To truly mature your resource management, we believe all areas must be considered collectively.

The transformation blueprint



1. Where are you now?

Determine your current maturity stage

Start with assessing where your resource management maturity is today - this is your baseline. From there you can make plans for, and begin, your transformation efforts.

There are five key stages of maturity based on the two overarching elements of resource management, those being:

1. People and processes
2. Software

For a quick indication of your maturity, take our interactive quiz.

The quiz centers around the two key elements above to provide a holistic result of your firm's maturity level, as well as how you scored for each area so you can spot maturity imbalances. These breakdowns are particularly useful to pinpoint specific areas of improvement to transform in [Section 3 of the blueprint, "How do you get there?"](#)

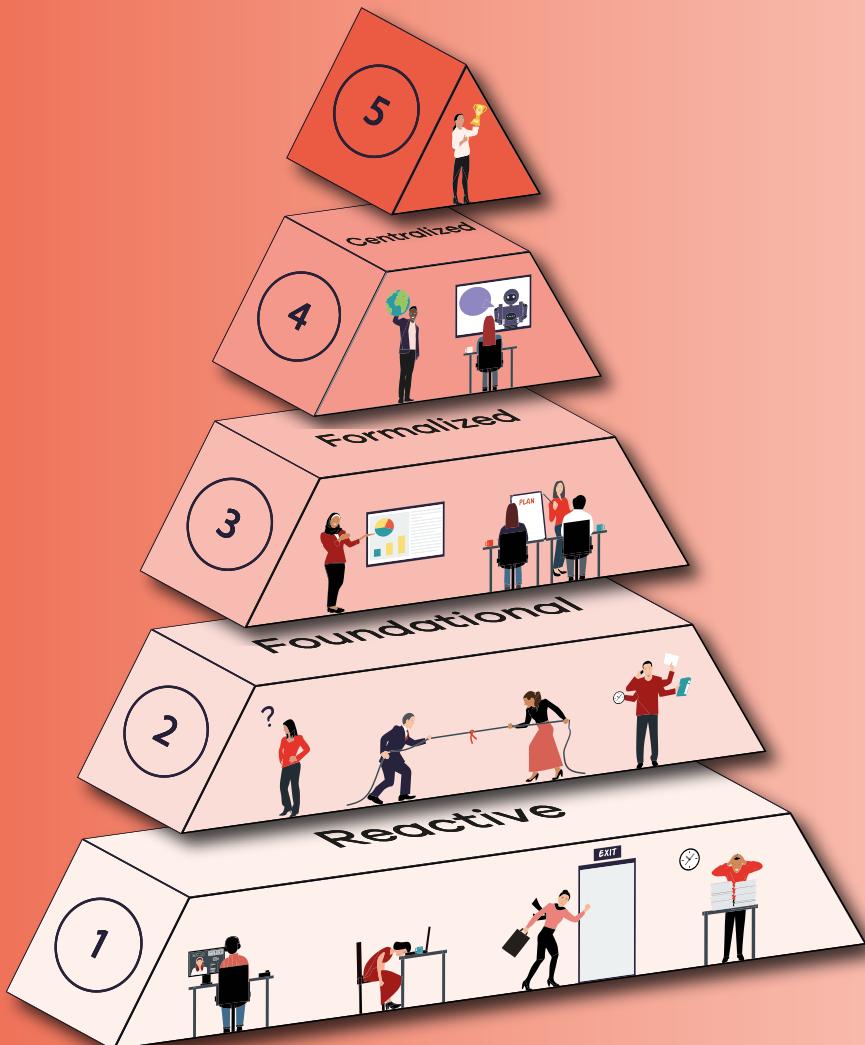
We recommend that you take the quiz to get an initial idea of your maturity level and then use the following two pages to thoroughly assess your maturity level and improvement areas.

Keep in mind that resource management maturity can differ between service lines, business units, and locations, so you may need to identify a maturity stage for each to really understand and determine your firm's overall resource management priorities.



[TAKE THE QUIZ](#)

The 5 stages of resource management maturity



Stage 5: Strategic

A strategic business function aligned to organizational goals delivering a substantial competitive advantage to the firm.

Stage 4: Centralized

An important business function contributing significant, consistent, and proactive value across the firm.

Stage 3: Formalized

An established business function with inconsistent processes and moderate attention on improving efficiencies.

Stage 2: Foundational

An operational business function with some consideration of best practices and improving efficiencies.

Stage 1: Reactive

An administrative, reactive, and mostly inefficient process or function.

A note on scoring: To truly be functioning at a certain maturity stage, we believe all aspects of that stage across people and processes, and software must be fulfilled. For example, a Stage 3 for people and processes (process maturity) and a Stage 2 for software (software maturity) means your overall maturity stage is Stage 2.

To keep track of your self-assessment, download our interactive checklist (which mirrors the table below) for clarity on where your strengths and gaps are.

[DOWNLOAD](#)

Stage	People and processes	Software
5	<ul style="list-style-type: none"> Strategic, firm-wide Resource Management Office (RMO) with representation at the leadership table and interlocked with other departments Dedicated resource managers use AI and/or automation to fully optimize the workforce for efficiency, utilization, and client/employee outcomes <ul style="list-style-type: none"> Centralized resourcing; people are allocated to work holistically, across service lines and/or locations Skills data is used strategically to manage supply and demand, and develop career and training plans 	<ul style="list-style-type: none"> Dedicated, modern resource management software with AI/automation contributing heavily to scheduling, with minimal manual reviews/approvals Integrated best-of-breed and ERP systems for an optimal, seamless "all-in-one" solution Centralized, real-time, granular reporting on organizational metrics, e.g., not only staffing, but supply and demand forecasting, and training and hiring plans
4	<ul style="list-style-type: none"> Processes are documented and monitored for compliance Dedicated, objective resource managers whose roles encompass more than just scheduling Centralized resource sharing across service lines and/or locations <ul style="list-style-type: none"> Resources "belong" to the firm, not specific teams Skills database is centralized, housed in software, and used to assign work to the most suitable resources 	<ul style="list-style-type: none"> Dedicated, modern resource management software with AI and automated staffing capabilities <ul style="list-style-type: none"> Experimenting with AI or automation to increase efficiencies and make optimal resourcing decisions Integrations from ERP or practice management in place for skills, projects, financials etc Single system used for resource management processes and reporting, with automation and export functionality
3	<ul style="list-style-type: none"> Resourcing processes are fully documented Dedicated resource managers carry out scheduling, not client teams Resources are sometimes shared across the firm, but it's not standard practice Skills database is centralized 	<ul style="list-style-type: none"> Dedicated resource management software in addition to other practice management technology Engagement financials through practice management or PSA but are not integrated with scheduling; e.g., hard to track budgets to actuals <ul style="list-style-type: none"> Reporting available but clunky and hard to manipulate or export
2	<ul style="list-style-type: none"> Processes exist but are ad-hoc across multiple systems <ul style="list-style-type: none"> Fee earners spend a lot of time scheduling Resources may be shared but "belong" to the team, not the firm If a resource manager or scheduler is in place, they are in an admin or support role to the client managers Skills database is decentralized and in spreadsheets 	<ul style="list-style-type: none"> Scheduling within a larger ERP, PSA, or practice management software, alongside the use of spreadsheets Project budgets are not integrated with (and therefore hard to consider when) scheduling <ul style="list-style-type: none"> Manual spreadsheet-based reporting on core metrics
1	<ul style="list-style-type: none"> Reactive and manual work allocation with no documented processes or controls Scheduling is done by fee-earners in delivery roles, or admin roles <ul style="list-style-type: none"> No usable skills database for matching jobs to staff 	<ul style="list-style-type: none"> Scheduling with spreadsheets Limited to no reporting on utilization or other resource management metrics

2. Where do you want to be?

What do you want to achieve?

Once you've plotted your current maturity, the next step is working out where your firm wants to be. The key questions to ask here are: "What benefits do you want to achieve by maturing?" and, "What's standing in your way to achieving your goal?"

Depending on what you want to achieve, the path to your goal stage will be achieved taking one of two routes:

1. The linear approach



2. The leapfrog approach



The linear approach

Your goal stage happens to be the next logical stage to where you are in the pyramid currently. In this route the blockers are lower, due to being closer to your goal stage.

The leapfrog approach

Your goal stage is at least two stages above your current maturity stage, meaning progression to your goal stage will typically take longer with more challenging blockers to tackle. However, in forward thinking you'll be able to leapfrog certain criteria/stages altogether, saving time and money in the long run. *For example, if you know you want to make use of AI, it makes sense to go straight for a solution with that functionality rather than a stopgap solution without it. Other criteria may be better tackled linearly to gain incremental benefits, for example, rolling out and training people on new processes before you mature to a method of monitoring and automating these processes.*

In our experience, most firms have a goal stage that is achieved by using the leapfrog approach, because while some aspects mature linearly, others can be bypassed by leapfrogging.

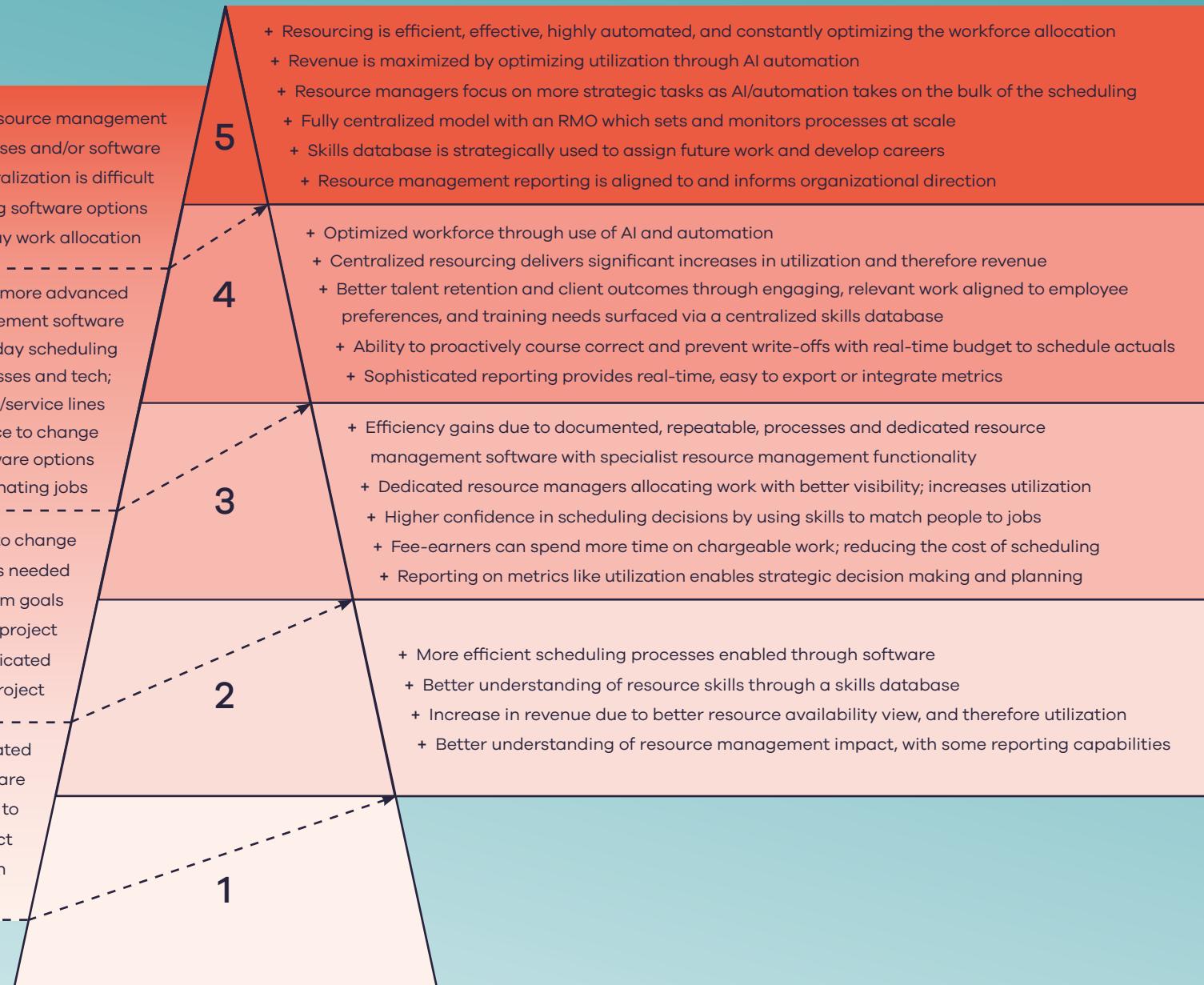
On the next page we've broken down the key benefits and typical blockers of maturing linearly from one stage to another. This is useful to understand the incremental benefits of maturing (especially as you become more mature) and help you to map out which criteria your firm should leapfrog.

You can also refer to your checklist assessment in [Section 1 of the blueprint](#) to understand how close or how far away you are from each stage which may help you to decide what stage to set as your goal.

Typical blockers between stages:

- Resistance to further change in resource management processes and/or software
- Micro-cultures across service lines; centralization is difficult
 - Difficulty comparing software options
 - Change management in the day-to-day work allocation
- Difficulty building the business case for more advanced resource management software
 - Change management in day-to-day scheduling
- Existing system heavily ingrained in processes and tech; need buy-in from multiple locations/service lines
 - Resistance to change
 - Difficulty comparing software options
 - Unfounded fear of automation eliminating jobs
- Resistance to change
 - Dedicated resource managers needed
 - Unsure how resourcing impacts firm goals
- Limited resources for an implementation project
 - Lack of capacity or investment in dedicated roles/champions to drive a transformation project
- Lack of scale and/or complexity for dedicated resource management software
 - Lack of budget and/or internal resource to manage a transformation project
 - Lack of vision; resourcing = admin
 - Schedulers/resource managers needed

Key benefits at each stage:



3. How do you get there?

Plot your transformation journey

Now you have identified where you are and where you want to be, the challenge of getting there begins!

The key question to ask here is: "How does your firm change, develop, or improve to reach your goal stage?"

By mapping your current maturity and gaps ([Section 1 of the blueprint](#)) and identifying what your goal stage is ([Section 2 of the blueprint](#)) you've made a lot of progress towards answering this question because you know what needs to happen across the two key areas of people and processes, and software. Turning this into an actionable project is the next step.

Regardless of your maturity starting point or goal stage, use the following framework of typical steps to plan your transformation journey.

8 steps to transformation success:

1. Define your initial goals

List the benefits you want to achieve alongside the action needed to achieve them ([Section 2 of the blueprint](#)). What ultimately are you trying to achieve and how will you know you've achieved it? List the expected blockers (risk factors) which might obstruct your goal and consider the mitigation methods needed.

2. Obtain executive buy-in

Being thorough in the first step will help you make a business case that puts resourcing high on leadership's agenda, alleviating any buy-in blockers. Show them the expected results (from productivity to profitability) and if needed, update your goals after these conversations.

3. Establish project governance

Consider who will be involved in the resource management transformation project and what role they will have. *For example, do you have an existing project or change management team and/or do you need additional support?*

4. Complete a change impact assessment

Identify departments, roles, processes, or policies impacted by making these changes. This will be something that remains active throughout your project so you can continue to assess the changes and take actions.

5. Initiate a stakeholder analysis

Connect with stakeholders impacted and understand from their perspective what the benefits and blockers include. This will also be an input into your change impact assessment. *For example, does the HR team have difficulty tracking skills and creating efficient training plans? What changes could help you achieve your desired maturity goals while also addressing their challenges?*

6. Consider current perceptions of the function

In early maturity firms, resource management is viewed by many as, "just scheduling" and it can be difficult to get buy-in for the strategic impact the function can have. To challenge these perceptions, communicate the strategic objectives of the transformation and tackle objections head-on. Also consider how the name of the function could help with change management. Unsurprisingly, the name typically contains, "resource management" but some accounting firms call their function, "talent alignment" or, "talent experience management". These examples are a way to illustrate how resource management is aligned to bigger picture objectives. Regardless of the name or the preconceived notions, achieving your firm's objectives, through resource management improvements, is what will ultimately evolve perceptions of the function.

7. Create a project plan

Draft a timeline of when each outcome will be achieved (considering any blockers that need to be overcome) and who is owning each action. Use your knowledge of where you currently are ([Section 1 of the blueprint](#)) in terms of both process and software maturity to prioritize which actions in which category need the most attention to reach your goal stage. *For example, if your process maturity is higher than your software maturity, consider what actions to prioritize, such as creating a technology RFP to level up your software maturity first, rather than developing processes that don't have the technology to support them.*

8. Benchmark important metrics

Consider what measurements are important to your firm, such as resource utilisation, and identify future targets to measure success as the project progresses. Share these with your executives and stakeholders.



5 key software success factors:

In addition to our eight-step transformation plan, we've highlighted five key success factors to consider from a change management perspective when implementing new software in your resource management transformation journey.



LISA ROEN,
CEO at People Experience Solutions
and former People Experience
Director at Crowe



SARAH KIRKMAN,
Recruitment and Resourcing Lead
at Moore Kingston Smith



KRISTIANN PHELAN,
RMCP Resource Manager at Wolf &
Company



LEANNE WILKINS,
Head of Talent Acquisition and
Resourcing at MHA

1. Established project structure from the start

"One of the keys to a successful implementation is to establish the needed project structure from the start including the executive sponsor, project manager, and change lead. A great change strategy goes beyond only training and communications. An expert change team will collaborate with leaders to assess impacts to operational processes and look beyond obvious gaps to ensure a smooth transition to the new ways of working."

- Lisa Roen, CEO at People Experience Solutions

2. Gradual transitions

"The resource management solution we were using before was quite limited, so the change to Dayshape was transformational. We needed a gradual and measured approach to achieve buy-in from our stakeholders and Dayshape worked alongside us to help us achieve that."

- Sarah Kirkman, Recruitment and Resourcing Lead
at Moore Kingston Smith

3. Knowledge of resource management and your industry

"It was critical that our software vendor understood resource management, not just the product or software. Dayshape stood out in this area and connected us to existing customers in our industry which opened our eyes to areas of resource management we hadn't previously considered, such as centralization."

- Kristiann Phelan, RMCP Resource Manager at Wolf & Company

4. Regular, transparent communication

"The implementation of Dayshape went smoothly. We made sure we had someone from every office involved in each stage of the process from requirements gathering, all the way through to our Dayshape go-live date. This was supported by Dayshape with regular, solution-focused, communication to aid the transition."

- Leanne Wilkins, Head of Talent Acquisition and
Resourcing at MHA

5. Dedicated customer success representatives for ongoing transformation support

"Our relationship with Dayshape remains really positive. We have scheduled calls every couple of weeks for ongoing product support and a bi-weekly call with our dedicated customer success representative. These ensure we are getting the most out of Dayshape."

- Sarah Kirkman, Recruitment and Resourcing Lead
at Moore Kingston Smith

"Dayshape is a brilliant supplier, I really appreciate that our Customer Success Representative is not a salesperson - as is the case with a lot of software providers. My advice for others considering a similar project would be to go for a supplier like Dayshape, where their pricing structure is flat and their motivation for helping you is genuine."

- Leanne Wilkins, Head of Talent Acquisition and
Resourcing at MHA

Case study examples

A large transformation project can feel daunting in the early stages. Knowing this, we've provided case study examples using various approaches to reassure you that resource management transformation can, and should, be done. Several of these firms needed to contend with discrepancies between process and software maturity and bring them into closer alignment. Want to see more? [Click here to view all Dayshape customer case studies.](#)

Leapfrog: Stage 1 to Stage 3



Maturity breakdown before:

Process	Software	Overall
2	1	1*

Stage breakdown after:

Process	Software	Overall
3	4	3*

*As not all upper stage criteria met

To drive their plans for growth and balance utilization firm-wide, MHA opted for a radical resourcing transformation by adopting a future-proofed Stage 4 software maturity solution.

[Discover the key impacts and benefits made across the firm one year on from implementation.](#)

Leapfrog: Stage 1 to Stage 3



Maturity breakdown before:

Process	Software	Overall
1	3	1*

Stage breakdown after:

Process	Software	Overall
3	4	3*

*As not all upper stage criteria met

With a previously disjointed approach to resource management, Wolf & Company are well into their journey to unify 100% of their service lines under a centralized resourcing strategy.

[Discover the key challenges faced and benefits achieved at the start of this journey.](#)

Linear: Stage 3 to Stage 4



Maturity breakdown before:

Process	Software	Overall
3	3	3

Stage breakdown after:

Process	Software	Overall
4	4	4

Replacing existing, long-standing, specialized but legacy resourcing software can be daunting, time-consuming, costly, and hard to get right.

[With a strong focus on change management, discover how they overcame these blockers to reach their Stage 4 goal.](#)

4. Where do you want to go next?

Continuous improvement

Now you know your direction of travel and how to get there, the final questions to consider are: "How will you know you have arrived?" and, "Where are you going next?"

These questions will be easy to answer if you have executed [Section 3 of the blueprint, "How do you get there?"](#) thoroughly. By taking those steps, you'll have the following for your project:

1. Key milestones or project phases (review points)
2. Timelines
3. Benchmarks and success metrics

Transformation is a continuous process that could take several years if your end goal is more than two stages away from your current stage. Priorities, people, the market, and the shape of your firm will change during this time. Project milestones provide the pause to review:

1. Are the pain points still felt, should we adjust?
2. Do these objectives still matter? Is the prioritization order still the same?
3. Do we still have the right people and teams involved?
4. How are we doing against timelines and target goals? What's going well and what can we improve?
5. What have we learned that could apply to future transformation plans?

These questions are equally important in shorter term projects as they enable continuous improvement to happen. Always ask the question, "Where are we going next?" rather than closing off the project after you've reached your initial goal stage.

You may also be wondering, "What's next if I reach Stage 5?" Firstly, congratulations! Please get in touch to talk to us about your journey! Secondly, don't get complacent or lose the continuous improvement mindset. Resource management, and specifically resource management software, is always advancing.



Conclusion

Transforming your resource management maturity doesn't happen overnight. Improving your resourcing function is a large endeavor that involves both your people and processes, and your software.

However, with the right approach, support, and timeline, you can achieve your resource management maturity goals and reap the rewards of increased scheduling efficiencies, improved resource utilization, and better-informed resourcing decisions. And further still, if you seek to continuously improve this function, you will be able to confidently future-proof your firm by making resource management a strategic advantage.

Key to having that strategic advantage is picking the right transformation team and vendor that shares, and can adapt to, your firm's resource management vision both now and as it evolves in the future.

Special thanks

To the Resource Management Institute for providing us with knowledge, inspiration, and an inviting, professional community.



To change management expert, Lisa Roen of People Experience Solutions, who provided valuable contributions to this guide.



To our brilliant customers who supported this guide with testimonials and case studies. Thank you for choosing Dayshape to support your resource management maturity journey.



About Dayshape

AI-powered resource management software for professional services firms seeking Stage 4 resourcing maturity onwards.

Dayshape is AI-powered resource management software, built specifically for professional services firms. Dayshape is a future-proofed solution with flexible functionality including [AI scheduling](#) that can solve complex resourcing decisions in seconds, and at scale. Plus, automated budget and project controls, [live engagement financials](#), and [powerful reporting](#) that supports resource management to be the strategic function it needs to be for firm growth.

With over **75,000 people around the globe relying on Dayshape every day**, including numerous top 10 accounting firms, Dayshape is leading the way in resource management software innovation.

Mature your resourcing and future-proof your firm

Talk to our experts about how we can help you with your resource management transformation project.

[BOOK A DEMO](#)





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