Advanced Project Management Maturity with Task-Level Control from Level 2 to 4

Overview

This 3-day, hands-on workshop is tailored for professional services organizations managing Tasks in Certinia PSA with the Gantt chart. The goal is to advance project execution maturity from foundational, role-based control (Level 2) to task-level planning and execution, forward-looking operational insight, and portfolio-level optimization (Level 4). This enables teams to shift from reactive tracking to predictive delivery — improving resource accuracy, milestone-driven billing, and proactive margin management across the project portfolio.

Through facilitated discussions, practical templates, and aligned use cases, participants will identify gaps, standardize future-state practices, define ownership, implement KPIs, and create a prioritized execution roadmap specific to Tasks and Gantt project delivery.

Duration

- 3 Days
- Total instruction time: 18 hours

Location

- On-site & Remote

Target Audience

- Project Managers and Delivery Leads
- Professional Services Leaders
- PSA System Administrators
- PMO Professionals
- Finance and Billing Stakeholders

Prerequisites

Participants should have:

- A working understanding of Tasks and Gantt project setup and tracking in Certinia PSA
- Access to current project delivery, time capture, and billing processes
- Familiarity with their organization's forecast and margin reporting practices
- A cross-functional team including delivery, operations, and finance for full value

Learning Objectives

By the end of this workshop, participants will have collaborated on:

- An evaluation of their current Tasks and Gantt project management maturity

- Mapping existing and future-state resource processes

- Defining process ownership structures using RACI models

- Identifying and tracking performance using operational KPIs

- Documenting high-impact changes as use cases

- Building a prioritized implementation and change adoption roadmap

- Planning for needed Certinia PSA features and data clean-up

Workshop Assets and Deliverables

Assets:

- Process maturity model (levels 1-4)

- Inventory of As-Is Processes - Template

- Use Case To-Be Processes - Template

- KPI - Template

- Backlog – Template

Deliverables:

- Maturity Model Reference Guide

- As-Is and To-Be Process Mappings

- RACI and Role Assignments

- KPI and Metrics Tracker

- Prioritized Implementation & Change Backlog

Workshop Agenda

DAY ONE: Foundation and Process Design

- Session 1: Introduction to Project Management Maturity for Tasks and Gantt

    - Welcome and Objectives

    - Overview of Levels 1–4 Maturity for Tasks and Gantt

    - Characteristics of current state and future goals for Tasks and Gantt project delivery

- Session 2: Process Identification & Mapping

    - Group discussion: Identify and rank current pain points in Tasks and Gantt project execution

    - Map current "As-Is" workflows: project setup, staffing, time tracking, revenue capture, and billing

    - Align "To-Be" processes with Level 1-4 capabilities, such as:
        - PM_CAP_1.0.1 All customer Projects are setup and related with an Opportunity
        - PM_CAP_1.0.3 All project fixed fees are scheduled against the project enabling fixed fee revenue forecasting and timely billing
        - PM_CAP_1.0.6 Expense billings and costs are tracked against customer projects
        - PM_CAP_2.0.1 When creating projects, project attributes, fixed fees/milestones, resource requests, and project tasks are created using templates
        - PM_CAP_2.0.2 Customer projects require assignments of resources to the project to allow time against the project controlling hours, cost, and revenue for the project
        - PM_CAP_2.0.5 Internal non-billable projects are setup and resource managers are able to factor in scheduled time / time off against these projects when making staffing decisions
        - PM_CAP_2.0.6 PS managers have visibility into the total planned hours vs actual hours, planned billings vs actual billings, and planned cost vs actual cost
        - PM_CAP_2.0.7 Progress toward completing a milestone is tracked on each milestone

- PM_CAP_2.0.8 Client billings are systematically generated and include all approved timecards, expense reports, billing milestones, and miscellaneous adjustments
- PM_CAP_3.0.1 Change request opportunity, project budget, assignment(s), and milestone(s) are created from the existing project
- PM_CAP_3.0.2 Planned hours vs actual hours are managed at the assignment, milestone and project level
- PM_CAP_3.0.3 Scheduled hours / future scheduled hours are managed at the WEEK level
- PM_CAP_3.0.4 Estimate At Completion (EAC) values are calculated and managed at the assignment, Milestone, and project level
- PM_CAP_3.0.5 ETCs are calculated and managed on all project assignments and roll up to the project
- PM_CAP_3.0.7 Invoiced amounts are systematically updated on all billable business records and updated on the project
- PM_CAP_4.0.1 Assignments of resources to tasks are managed at a task level
- PM_CAP_4.0.2 Estimated and actual time is managed at a task level
- PM_CAP_4.0.3 Corrective action taken to balance ETCs across assignments
- PM_CAP_4.0.4 Unscheduled backlog calculated and managed via new assignments and milestones
- PM_CAP_4.0.5 Actual Revenue, Costs, and Margin managed on PORTFOLIOS of customer projects
- PM_CAP_4.0.6 Project tasks dates and hours drive updates to resource Assignments

DAY TWO: Metrics and Accountability

- Session 3: Roles, Responsibilities & Accountability

  - Assign ownership for each phase of the Tasks and Gantt lifecycle:

    - Setup

    - Forecasting

    - Margin tracking

    - Invoice readiness

  - Create RACI matrices for key activities such as:

- Time entry and approval

- EAC/ETC reviews

- Change request handling

- Revenue forecasting and variance response

  - Define governance for process adherence and updates

- Session 4: Key Metrics & Feedback Loops

  - Define measurement plans and reporting cadence for:

    - PM_KPI_1 Project Profitability: Calculates margin and profit per project, factoring in revenue, costs, and resource expenses

    - PM_KPI_2 Project Schedule Variance: Monitors deviations between planned and actual timelines, highlighting at-risk projects

    - PM_KPI_3 Budget Burnup/Burndown: Tracks budget consumption versus project progress to avoid overruns

    - PM_KPI_4 Project Completion Rate: Measures the percentage of completed tasks or milestones against the project plan

    - PM_KPI_5 Project Risk Indicators: Forecasts potential risks based on schedule, resource, or financial variances

    - PM_KPI_6 Revenue Forecast: Provides real-time and predictive revenue projections, segmented by actual, scheduled, and unscheduled revenue

    - PM_KPI_7 Billings (Scheduled vs. Actual): Monitors invoiced amounts compared to planned billings, supporting cash flow management

    - PM_KPI_8 Billing Cycle Time: Measures the time from project completion to invoice generation, targeting reductions for improved cash flow

  - Discuss feedback mechanisms:

    - Weekly margin and ETC review cycles

    - Automated alerts on margin deviation or revenue misalignment

    - Forecast validation checkpoints for upcoming billing periods

DAY THREE: Execution Roadmap & Wrap-up

- Session 5: Implementation Roadmap & Use Case Definition

    - Group activity: Rank process changes by impact and feasibility

    - Document use cases for key changes and Certinia configuration

    - Identify required data clean-up or migration tasks

- Session 6: Closing & Next Steps

    - Review all use cases and secure alignment

    - Develop a prioritized feature and data backlog

    - Define post-workshop action items and success checkpoints