

Advancing Maturity in Resource Management from Level 1 to 3

Overview

This in-depth, two-day workshop is designed for professional services organizations using Certinia PSA who are ready to mature their resource management capability from unstructured, ad hoc practices (Level 1) to a defined, repeatable, and controlled model (Level 3).

Through expert facilitation, collaborative exercises, and use of proprietary tools and templates, participants will create a clear roadmap for evolving their resource planning, ownership models, and operational KPIs—fully supported by Certinia PSA functionality

Duration

- 2 Days
- Total instruction time: 12 hours

Location

- On-Site

Target Audience

- Professional Services Leaders
- Resource Managers
- Project and Delivery Managers
- PMO Professionals
- Change Management Stakeholders

Prerequisites

Participants should have:

- A basic understanding of Certinia PSA Resource Management functionality
- Access to current resource management processes and configurations
- Familiarity with their organization's staffing workflows, roles, and data management
- A cross-functional team including operations, delivery, and PSA system admins is recommended for full benefit

Learning Objectives

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

- An evaluation of their current resource 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 1-3)
- 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 the Resource Management Maturity Model
 - Welcome and Objectives
 - Overview of Maturity Levels 1–3
 - Characteristics of current challenges and desired future state
- Session 2: Process Identification & Mapping
 - Discussion: Pain point identification and ranking
 - Map “As-Is” processes against maturity benchmarks
 - Define and document “To-Be” processes for 2–3 priority areas
- Session 3: Roles, Responsibilities & Accountability
 - Assign process ownership across functional teams
 - Develop RACI matrices for critical workflows
 - Define governance for process adherence and updates

DAY TWO: Metrics, Tools, and Execution Planning

- Session 4: Key Metrics & Feedback Loops
 - Define KPIs for each “To-Be” process (e.g., Time to Staff, Utilization)
 - Introduce feedback mechanisms (e.g., weekly review cycles)
 - Align metrics with business goals
- 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