

Advancing Maturity in Skills Management from Level 1 to Level 3

Overview

This one-day, hands-on workshop is designed to help professional services organizations improve their skills management maturity using Certinia PSA. The goal is to transition from disconnected skill inventories and inconsistent tracking (Level 1) to an integrated and proactive model (Level 3) that supports resource planning, career development, and project success.

Participants will explore best practices for building a skills catalogue, standardizing rating systems, aligning resource capabilities with demand, and defining measurable KPIs. Practical tools and exercises will help teams define processes, ownership, and a roadmap for implementation.

Duration

- 1 Day
- Total instruction time: 6 hours

Location

- On-Site

Target Audience

- Resource Managers
- Functional and Delivery Leaders
- Talent & Learning Development Teams
- PSA System Administrators
- Project and Portfolio Managers

Prerequisites

Participants should have:

- Basic familiarity with Certinia PSA Skills & Certifications functionality
- Knowledge of their organization's current skill tracking and staffing practices
- An interdisciplinary team (ops, delivery, talent, PSA admin) is recommended

Learning Objectives

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

- Evaluating current skills management maturity and gaps
- Documenting existing and future-state skills processes
- Aligning internal stakeholders on ownership and governance
- Defining KPIs such as Time to Staff by Skill and Skills Coverage
- Building a skills-based staffing model supported by Certinia PSA
- Creating a prioritized implementation and adoption roadmap

Workshop Assets and Deliverables

Assets Provided:

- Skills Management Maturity Model (L1–L3)
- 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

Morning Session

- Session 1: Introduction to Skills Management Maturity
 - Workshop Kickoff & Objectives
 - Overview of Levels 1–3 Skills Management
 - *Level 1:* Skills catalogue only
 - *Level 2:* Skills assigned and rated per resource
 - *Level 3:* Skill sets, ratings agreement, and skill-based staffing
 - Discussion: Common challenges and desired outcomes
- Session 2: Process Mapping and Future-State Design
 - Exercise: Map current processes for skill tracking and project assignment
 - Identify pain points and capability gaps
 - Define To-Be processes using L2–L3 capabilities such as:
 - SM_CAP_2.0.1: Each resource has one or more skill rating
 - SM_CAP_2.0.2: Resource managers tracking available skills relative to resources' skills ratings
 - SM_CAP_3.0.1: Skill set management
 - SM_CAP_3.0.2: Skill ratings with manager agreement
 - SM_CAP_3.0.3, 3.0.4: Skill-based staffing via requests and templates
 - SM_CAP_3.0.5: Capacity vs. demand skill monitoring

Afternoon Session

- Session 3: Ownership and Accountability
 - Define roles and responsibilities for:
 - Maintaining the skill catalogue
 - Managing skill sets
 - Reviewing and updating ratings
 - Managing skill request workflows
 - Develop a RACI matrix for key activities
 - Discuss alignment with HR or talent systems (if applicable)
- Session 4: KPIs and Implementation Planning
 - Define and prioritize metrics including:
 - SM_KPI_1: Time to Staff by Skill
 - SM_KPI_2: Skills Inventory Coverage
 - SM_KPI_4: Skills Gap Analysis
 - SM_KPI_5: Skills Capacity vs. Demand
 - Introduce feedback mechanisms (e.g., quarterly reviews, manager dashboards)
 - Group activity: Draft roadmap with prioritized actions and dependencies
 - Closeout: Review deliverables and confirm ownership for post-workshop execution