

Advancing Maturity in Time Management from Level 1 to 3

Workshop Overview

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

Participants will analyze their current maturity, design future-state processes, and leverage Certinia PSA functionality to implement improvements that drive accuracy, compliance, billing timeliness, and utilization transparency.

Duration

- 2 Days (6 hours per day, including breaks)
- Total Instruction Time: 12 hours

Location

- On-Site

Target Audience

- Professional Services Leaders
- Project Managers
- Time Approvers and Functional Managers
- PSA Administrators
- Finance & Billing Teams

Prerequisites

Participants should have:

- A foundational understanding of Certinia PSA Time Management functionality
- Familiarity with current time entry and approval workflows
- Visibility into compliance requirements
- A cross-functional team (delivery, finance, operations) is recommended for full alignment

Learning Objectives

By the end of this workshop, participants will:

- Evaluate current time management maturity
- Identify and document core “As-Is” and “To-Be” time processes
- Define roles and responsibilities using RACI models
- Establish KPIs such as Time Entry Compliance, Utilization, and Approval Timeliness
- Build a roadmap for configuration, change management, and feature adoption
- Document time management use cases to support implementation and governance

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: Foundations and Future-State Design

- Session 1: Introduction to Time Management Maturity
 - Welcome and Workshop Objectives
 - Overview of Time Management Maturity Model Levels 1–3
 - Discussion: Challenges of L1 (e.g., auto-approved time, billing lag) vs. Goals of L3 (e.g., compliance tracking, approval workflows)
- Session 2: Process Identification & Mapping
 - Group Discussion: Current pain points with time capture, approval, and reporting
 - Process Mapping:
 - Map “As-Is” practices (e.g., auto-approval, minimal review, billing corrections)
 - Align “To-Be” processes with Level 2–3 capabilities, such as:
 - Timecard review and approval by project and functional managers
 - Time entry linked to assignments with cost and bill rates
 - Fixed-fee milestone time tracking
 - Utilization time actuals monitored and controlled
- Session 3: Roles, Responsibilities & Accountability
 - Assign accountability for time processes (PMs, FMs, Billing, Admins)
 - Develop RACI Matrix for key activities:
 - Time entry reminders
 - Approval workflows
 - Escalation paths for missing time
 - Editing of approved timecards
 - Define governance for process adherence and updates

DAY TWO: Metrics, Systems, and Implementation Planning

- Session 4: Metrics & Feedback Loops
 - Define KPIs across compliance, performance, and billing alignment:
 - Actual Hours Logged
 - Time Entry Compliance Rate
 - Time to Approve Timecards
 - Hour Variance % (Scheduled vs. Actual)
 - Billable vs. Non-Billable Hours
 - Resource Availability
 - Design feedback loops: weekly compliance reports, system-generated reminders, manager dashboards
 - Align metrics with business goals
- Session 5: Implementation Roadmap & Use Case Definition
 - Group exercise: Prioritize process and system improvements using impact vs. effort
 - Draft use cases for each key process improvement
 - Identify required data clean-up or migration tasks
- Session 6: Closing & Next Steps
 - Review use cases and secure stakeholder alignment
 - Develop a prioritized feature and data backlog
 - Confirm next steps for enablement, training, and backlog execution
 - Assign post-workshop owners for follow-through and adoption