

Foundational Project Management Maturity - T&M, Fixed Fee, & Hybrid from Level 1 to 3

Overview

This 2-day, hands-on workshop is tailored for professional services organizations managing T&M, Fixed Fee, or Hybrid projects in Certinia PSA. The goal is to advance project execution maturity from initial loosely defined, reactive practices (Level 1) to a repeatable, controlled, forecast-driven approach (Level 3), enabling accurate staffing, revenue recognition, and billing predictability.

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 Hybrid project delivery.

Duration

- 2 Days
- Total instruction time: 12 hours

Location

- On-site and 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 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 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 1-3)
- 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 Project Management Maturity for T&M, Fixed Fee, and Hybrid Scenarios
 - Welcome and Objectives
 - Overview of Levels 1–3 Maturity for Project Management
 - Characteristics of current state and future goals for project delivery
- Session 2: Process Identification & Mapping
 - Group discussion: Identify and rank current pain points in project execution
 - Map current “As-Is” workflows: project setup, staffing, time tracking, revenue capture, and billing
 - Align “To-Be” processes with Level 1-3 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, and resource requests 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_3.0.6 Actual Revenue, Costs, and Margin are calculated and managed on all INDIVIDUAL customer projects
- PM_CAP_3.0.7 Invoiced amounts are systematically updated on all billable business records and updated on the project
- PM_CAP_3.0.8 Project tasks are managed as a checklist of items that allow for management of dates, statuses of the tasks, and time tracking against the tasks

DAY TWO: Metrics, Accountability, Execution Roadmap & Wrap-up

- Session 3: Roles, Responsibilities & Accountability
 - Assign ownership for each phase of the project 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
- 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