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We Help Services Organizations  
Get Better At What They Do

# Self-Assessment Guide for Resource Management

For

## Clients-Facing Service Organizations

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## ***Introduction***

Since its inception the Resource Management Institute (RMI) has been dedicated to the advancement of resource and workforce management best practices, research and training. As the industry continues to adopt and develop more effective resource management capabilities, the strategic value of doing so is becoming more and more apparent. A successful future in the service world belongs to those who excel at resource management. A common question RMI members ask is how do we know where we stand relative to our peer group? There are several ways, starting with using RMI research to benchmark your company vs. others. Some companies choose to use RTMC, our parent company to conduct full-scale assessments and assist with process and technology transformation. A third approach is to start with a self-assessment using the RMI's Resource Management Maturity Model.

The purpose of this paper is to describe the full scope of effective enterprise resource management and allow organizations to self-assess the maturity of their current resource management performance.

## ***About Resource Management in Client-Facing Service Organizations***

Growing competition and marketplace changes put continuous pressure on client-facing service organizations such as professional/consulting services; technology services, marketing agencies; accounting and law firms; to adapt and innovate to meet the needs and direction of the business.

Services organizations are highly reliant on their people. Skilled resources drive the business model and represent the largest area of cost. For every 100 resources, just a 1% increase in billable utilization improvement results in nearly \$500k of revenue that falls to the bottom line. The companies who get resource management right have a distinct competitive edge through greater profitability and the ability to scale their teams.

The RMI's belief is that there is still a lot of room for improvement across the industry. The function is not static. Whether you are a small growth company or a large, mature organization, your resource management capabilities are always evolving as the business grows and changes.

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Since 2008, RTM Consulting and the RMI, have been setting the standard for resource management. Whether for client-facing service organizations providing billable services to its customers, or internal teams like Product Development, Engineering and IT, enabling critical business strategy, the same overall goal has applied: ***Getting the right person, to the right place, at the right time.***

We have helped many customers over the years design and implement world class global resource management capabilities by leveraging our extensive resource management experience and Just-in-Time Resourcing® framework (JITR). JITR is our comprehensive framework for resource management leading practices for a wide range of resource-intensive delivery and enterprise organizations. Each area of JITR has evolved and expanded over time through learning and collaboration between the RMI, its members, and numerous RTMC consulting engagements.

Each area of JITR will be further explained as part of this maturity assessment.



## ***Resource Management Maturity Model Overview***

The goal with this white paper is to allow you to assess your organization's resource management maturity, a DIY guide to resource management.

In our experience, resource management is not a one-size fits all function. Depending on your size or type of organization, leading practices and options can vary. The goal of assessing against a maturity model helps eliminate generalized comparisons and helps you determine what maturity is and how it applies to your organization.

The RMI's maturity model is structured based on the Just-in-Time Resourcing® framework. This comprehensive view lays out all of the functional elements of resource management. An effective and mature resource management function is a sum of all these parts. From our experience, however, it is common for organizations to perform better in some areas than others. This maturity model will help you to identify where your organization has strengths and weaknesses relative to leading resource management practices.

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The purpose of this model is to allow you to determine where your organization is relative to resource management functional maturity. For each category, determine where your organization is. Use the following table as a guide:

|                |  |
|----------------|--|
| <b>Level 1</b> | Represents a non-existent function, or resource management processes that are providing the organization little to minimal benefit.  |
| <b>Level 2</b> | Some basic evidence of process or existence of RM functions, but the processes lack formality and repeatability. Not much is codified or adopted consistently across the organization.                   |
| <b>Level 3</b> | Demonstrates you have invested in resource management capabilities and processes and starting to get the basics right, but shortcomings exist, causing you to still be more reactive and less strategic. |
| <b>Level 4</b> | Shows that resource management in your organization is adding value. It is more proactive than reactive. Resource management is more integrated into the service delivery model.                         |
| <b>Level 5</b> | You are an industry leader in a specific area or overall. Resource management is strategic for the organization and a critical element of meeting organizational objectives.                             |

For the purposes of assessing your organization's resource management function, categories that correspond with the resource management organization and each of the six functional elements of the RMI's Just-in-Time Resourcing® framework have been defined. A full view of the RMI's maturity model, along with an executive summary can be found on the RMI's website: <https://resourcemanagementinstitute.com/resource-management-maturity-model/>.

Score your organization in each category using a whole number 1 – 5 (if you are really undecided, score yourself using an increment of .5). Your overall score should be the average of the scores by category. This will provide you with a sense of where your organization's resource management maturity is, and what lies ahead in your journey to a more mature resource management function.

### ***Assessing Your Resource Management Maturity***

To complete your resource management maturity assessment, review each category section. Each section provides a brief overview of the category along with all the characteristics that define levels of maturity. Read through all of the content and then determine what the maturity level is for your organization in that category. Be honest! We recommend setting aside the rose-colored glasses and being as objective as possible. Good luck!

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## Organization

Organization is how the resource management team is structured and aligned in the broader organization and company. Key considerations are whether it is centralized or decentralized, as this can have an impact on its effectiveness.

| Level 1   | Level 2   | Level 3   | Level 4  | Level 5  |
|---|---|---|--|--|
| <ul style="list-style-type: none"> <li>• RM is done organically by delivery teams</li> <li>• No dedicated RMs performing Resource Management</li> </ul> | <ul style="list-style-type: none"> <li>• Existence of RMs working directly for individual teams</li> <li>• Resources are viewed as belonging to individual teams</li> </ul> | <ul style="list-style-type: none"> <li>• RMO in place with a clear charter to define and execute processes across the organization</li> <li>• Some capability for visibility to resources across teams</li> </ul> | <ul style="list-style-type: none"> <li>• RMO is global, centralized model</li> <li>• RMO is organizationally positioned to be objective (free from influence of organizational silos)</li> <li>• Resources viewed as belonging to organization (vs. a particular department)</li> <li>• RMO starting to take responsibility for some key organizational metrics</li> </ul> | <ul style="list-style-type: none"> <li>• RMO is strategic global function with seat at the table</li> <li>• RMO invested in and supported like other operational functions</li> <li>• RMO is integral to achieving organizational goals (customer/employee/financial)</li> </ul> |

Your maturity score for Organization is:

## Supply Management (Skills Inventory)

Supply management focuses on how well your organization knows your current resources (employees). It encompasses having access to critical profile information (location, cost, role) as well as skills, experience and work assignments. More mature organizations maintain a rich and relevant set of data on their teams to enable insightful views into the capacity they have.

| Level 1   | Level 2   | Level 3   | Level 4  | Level 5   |
|---|---|---|--|---|
| <ul style="list-style-type: none"> <li>• Role names are inconsistently used across teams and not standardized</li> <li>• Understanding of skills and capabilities is tribal</li> <li>• No Skills Inventory</li> </ul> | <ul style="list-style-type: none"> <li>• Some framework for role definition, but not controlled</li> <li>• Skills are tracked in a decentralized manner</li> <li>• No process around skills input or updates</li> </ul> | <ul style="list-style-type: none"> <li>• Skills Inventory and profile data managed centrally across the organization</li> <li>• Limited confidence in skills data and accuracy</li> <li>• Roles formally defined and consistent across teams</li> </ul> | <ul style="list-style-type: none"> <li>• Skills Inventory and profile data managed centrally with documented governance process</li> <li>• Ongoing process for resources to update skills</li> <li>• Skills and roles are normalized across organizational boundaries</li> <li>• Skills data is utilized to support skills development initiatives</li> <li>• Role names and definitions consistently align with the rates and costs of resources</li> </ul> | <ul style="list-style-type: none"> <li>• Skills and roles are well known and understood by the organization with strong compliance</li> <li>• Skills inventory is utilized strategically to track employee aspirations and assist with employee engagement</li> <li>• Ongoing quality management process</li> <li>• Skills data is synchronized across HR and delivery systems</li> </ul> |

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## Staffing

Staffing is the process whereby organizations determine who should work on what. This is especially important when juggling a mix of short- and long-term assignments. The goal is to be more proactive with allocating resources to work, starting the allocation process earlier during the sales process, as well as providing better enablement for the sharing or moving of resources across teams.

| Level 1  | Level 2  | Level 3  | Level 4   | Level 5  |
|--|--|--|---|--|
| <ul style="list-style-type: none"> <li>• Staffing activity occurs after a deal is sold</li> <li>• Lack of clarity in understanding resource and role requirements of new projects</li> </ul> | <ul style="list-style-type: none"> <li>• Staffing is decentralized and performed by line managers for their resources</li> <li>• Requests for resources come from many sources and in many forms</li> <li>• Limited capability to share resources across teams</li> <li>• Little to no ability to conduct scenario planning</li> </ul> | <ul style="list-style-type: none"> <li>• Staffing discussions occur prior to a deal being closed/won by sales</li> <li>• Staffing function is facilitated centrally to support cross-team sharing of resources</li> <li>• Standardized way in which resources are requested</li> </ul> | <ul style="list-style-type: none"> <li>• Resource request process is well-defined and followed across the business, including prioritization and resolution process for staffing conflicts.</li> <li>• Most new work streams have a defined resource plan and soft-booked resources prior to being closed/won by sales</li> </ul> | <ul style="list-style-type: none"> <li>• All new work streams have a defined resource plan and soft-booked resources prior to being closed/won by sales</li> <li>• Centralized RMO utilizes scenario planning for resource assignments</li> <li>• Staffing effectively balances keeping employees satisfied while meeting the demands of the business</li> </ul> |

Your maturity score for Staffing / Allocation is:

## Demand Management (Forecasting)

Demand management is the process of aggregating all demand inputs and data on a continuous basis to have a clear view as to what is required to deliver work over a specific time period. Effectively aligning the right resources against demand in the right timeframes requires a clear and rich view of all drivers of demand.

| Level 1   | Level 2   | Level 3  | Level 4  | Level 5   |
|---|---|--|--|---|
| <ul style="list-style-type: none"> <li>• Limited to no visibility to upcoming demand for resources</li> <li>• No understanding of current supply by roles and teams</li> <li>• Unable to map current supply of resources to the planned demand</li> </ul> | <ul style="list-style-type: none"> <li>• Demand data exists, but a lack of confidence and accountability in sources of demand data</li> <li>• Utilize a basic process for identifying resource needs for future demand</li> <li>• Resource forecasting is ad-hoc and manually intensive with rudimentary automation</li> <li>• Limited understanding of current supply and availability of resources</li> </ul> | <ul style="list-style-type: none"> <li>• Ability to see open and assigned roles as well as where there's available capacity</li> <li>• Ability to aggregate demand data centrally with some sense of confidence in the quality of the data</li> <li>• Interlock meetings occur with the teams who create and manage demand to monitor upcoming demand</li> </ul> | <ul style="list-style-type: none"> <li>• Ability to forecast (with confidence) resource demand for the next 3-6+ months by roles needed</li> <li>• Ability to aggregate data and run reports on demand and capacity data. Perform analytics</li> <li>• Ability to overlay supply and demand in an automation tool to identify gaps or surpluses of resources</li> <li>• Strong interlock process with demand sources that drives strategic, data-driven decisions</li> </ul> | <ul style="list-style-type: none"> <li>• Interlocks viewed as strategic and used for data-driven decisions</li> <li>• Forecasting accuracy is tracked and leveraged for continuous improvement</li> <li>• Advanced analytics and predictive automation leveraged</li> </ul> |

Your maturity score for Demand Management is:

## Sourcing & Development

Sourcing and development are the logical outcomes of effective supply and demand management. Once organizations have a good handle on demand and the current capabilities of their supply, sourcing and development strategies are how organizations address talent acquisition, the augmentation of third parties and strategies to develop new skills or reskill existing employees based on future strategic needs.

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| Level 1  | Level 2   | Level 3   | Level 4  | Level 5   |
|--|---|---|--|---|
| <ul style="list-style-type: none"> <li>• No connection between RM processes and sourcing supply and development</li> <li>• Sourcing strategy is decentralized and managed by individual teams</li> </ul> | <ul style="list-style-type: none"> <li>• No defined sourcing strategy for the overall organization</li> <li>• RM processes provide basic support for identification of hiring needs</li> <li>• Use of subcontractors and partners is transactional and decentralized</li> </ul> | <ul style="list-style-type: none"> <li>• Defined sourcing strategy for the overall organization</li> <li>• RM is contributing to the identification of resource hiring</li> <li>• Some rationalization and guidelines in place for subcontractor and partner usage</li> </ul> | <ul style="list-style-type: none"> <li>• Well-defined and centralized contractor/third party management with focus on mix and cost targets</li> <li>• RM leveraged to pinpoint hiring needs</li> <li>• RM identifies critical staff talent development opportunities</li> <li>• Management identifies employee career wants and needs for incorporation into staffing decisions</li> <li>• Recruiting is a continuous process</li> </ul> | <ul style="list-style-type: none"> <li>• Warm-pool recruiting strategy in place and executed</li> <li>• Long-term talent development strategy for every employee to drive employee engagement</li> <li>• Interlock established with contractors/third parties</li> <li>• Incorporate bottoms-up forecast to inform long term planning</li> <li>• Ability to understand cost of labor to drive sourcing decisions</li> </ul> |

Your maturity score for Sourcing & Development is:

## Technology

It is difficult to execute resource management at any reasonable scale without sufficient technology. The function is data intensive, and the data is always changing. This requires effective systems to capture the necessary information timely and with quality. Then, there is a need to aggregate, report and analyze the information in order to support resource management processes and drive necessary decision-making on resourcing.

| Level 1  | Level 2   | Level 3  | Level 4  | Level 5  |
|--|---|--|--|--|
| <ul style="list-style-type: none"> <li>• No enterprise business applications in place</li> <li>• Utilize non-standardized tools (i.e. spreadsheets)</li> </ul> | <ul style="list-style-type: none"> <li>• Overlap in system functionality with little to no integration of critical applications</li> <li>• Some reliance on non-standardized tools (i.e. spreadsheets)</li> </ul> | <ul style="list-style-type: none"> <li>• Enterprise application in place to support RM (PSA/PPM)</li> <li>• Manual effort to integrate with other systems</li> <li>• Application in place with limited and inconsistent adoption and usage by teams</li> </ul> | <ul style="list-style-type: none"> <li>• Automation integrates RM application to other delivery management systems</li> <li>• Commercial-grade capability exists for reporting and analytics</li> <li>• Above average adoption and usage of RM application and reduced dependency on spreadsheets</li> </ul> | <ul style="list-style-type: none"> <li>• Advanced analytics and predictive automation leveraged</li> <li>• Utilization of dashboards, reporting and analytics to drive business</li> <li>• RM technology viewed as the source of truth with high data integrity</li> </ul> |

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## Governance

Good processes typically have good governance to ensure they are followed and continuously improved and adopted. If you have not scored as well in prior process areas, chances are your governance maturity may be in a similar state. You will see from the criteria below that more mature resource management functions are more strategic and this is reflected in what metrics are measured and tracked.

| Level 1  | Level 2  | Level 3  | Level 4  | Level 5  |
|--|--|--|--|--|
| <ul style="list-style-type: none"> <li>• No documented RM processes</li> <li>• No monitoring or controls in place</li> <li>• No tracking of RM KPIs</li> </ul> | <ul style="list-style-type: none"> <li>• Ad-hoc RM processes exist</li> <li>• Monitoring happens in an ad-hoc manner and for limited RM functions</li> </ul> | <ul style="list-style-type: none"> <li>• RM processes documented and training provided</li> <li>• Consistent monitoring of RM process compliance</li> <li>• Some KPIs in place for RM functions</li> </ul> | <ul style="list-style-type: none"> <li>• Defined KPI's for RM performance and related process performance</li> <li>• Timely and accurate reporting and analytics of performance</li> <li>• Organizational accountability clearly defined</li> <li>• Developing continuous improvement processes</li> </ul> | <ul style="list-style-type: none"> <li>• Well defined accountability, monitoring and tracking of key RM processes</li> <li>• Real-time reporting and analytics on performance</li> <li>• Strong measurement of all aspects of RM performance</li> <li>• Continuous improvement processes in place</li> </ul> |

Your maturity score for Governance is:

## Summary and Interpreting Results

Now that you have scored your maturity for each category, do the following:

**Add your score from all seven categories:**

**Divide your total score by seven**

**This is your RM Maturity Assessment Score:**

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## ***Evaluating Your Score***

If you scored **2 or less**, you have some work to do. The bright side of this is that you have a great opportunity to make a significant impact on your organization. In our experience, immature resource management results in organizations being more reactive, less adaptable to change and lag in project-based work performance. Resource management can really make a difference.

If you scored **right around 3**, you clearly understand the value of resource management, and your organization has made investments in it to date. You have likely done some heavy lifting deploying the processes and technology to make this work. You are now looking to normalize and stabilize the function and starting to look at next level improvements to truly make resource management strategic.

If you scored **4 or higher**, congratulations, you are really starting to harness the benefits of resource management. Your resource management function is starting to show real impact on your organization and your business. You can manage your workforce in a more advanced and strategic way, and your organization's work performance and productivity is positively impacted from this. Don't be content, however, there is always more to improve.

## ***Closing Comments***

If you scored well on the maturity assessment, congratulations! You are in the clear minority of companies who manage their human capital resources well, likely because of your disciplined focus on a well-defined and documented resource management process.

If you did not score well, the good news is there are processes, automation tools, training and education, and consulting firms that can help you.

In some organizations, resource management can be overlooked or receive inconsistent attention, while the underlying causes of failure in quality or project performance are often directly related to a simple failure of not having the right person with the right skills in the right place at the right time. Establishment of a well-disciplined resource management function is at least as important to a services organization as any service delivery methodology, quality process, or project management process.

Good luck with becoming the most efficient and effective operation possible. Good resource management is the key!

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## About the Resource Management Institute (RMI)

The Resource Management Institute is dedicated to the advancement of resource and workforce management thought leadership, best practices and standards, globally recognized credentials that certify resource management expertise, and tools and resources necessary for effective and efficient management of human capital-intensive businesses. The Resource Management Institute was created to provide the resource and workforce management community a vehicle to advance the discipline of resource and workforce management, and further the interests of the people who make up this community and the companies they work for. Visit us at [www.resourcemanagementinstitute.com](http://www.resourcemanagementinstitute.com) and on [LinkedIn](#).

## About RTM Consulting

Specializing in Resource Management, RTM Consulting provides strategic and operational advisory services to service organizations. With its unique Just-in-Time Resourcing® solutions and business acceleration services, RTM Consulting helps large, medium and small firms move beyond theory to practical application of industry leading practices and achievement of exceptional results in the shortest possible period of time. RTMC also offers a full range of services around project and portfolio management, service business optimization, digital transformation, and training. For more information, please contact RTM Consulting at [info@rtmconsulting.net](mailto:info@rtmconsulting.net) or [www.rtmconsulting.net](http://www.rtmconsulting.net).

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