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Optimizing your most valuable asset:

How to better plan, forecast, and manage resources

How do business clichés become business clichés?

Because they're true — restated again and again, because they're timeless, appropriate, and applicable across the business universe.

Case in point: “Our most valuable asset is our people.” Especially in services businesses, success is wholly dependent on the talents and skillful deployment of a firms' employees. And never has that been truer than now, in a labor market that's tighter than it has been in decades.

In today's business environment, human capital-driven offerings are not only in high demand, they're also costly to deliver in terms of management, time, and money. Given that tough combination of challenges, even the most efficient organizations are struggling to allocate their resources efficiently across a diverse and ever-changing set of customer needs and expectations.

Two sides of the allocation coin

The difference between people management failure and success is stark: A resource allocation process that's slow or disconnected can cost a business millions in lost productivity, because the speed at which projects can be appropriately staffed directly impacts an organization's bottom line. Conversely, even small efficiency improvements can rapidly boost margins, deliver sustainable growth, and foster innovation. Needless to say, then, deftly identifying, retaining, and deploying top talent should be a top priority of any service business today.

The problem is, that's a whole lot easier said than done. Finding and retaining top talent is tough enough. But then the real challenge emerges: smartly deploying that talent. Lack of visibility into talent pool availability increases risk and impacts the bottom line. And suboptimal resource allocation — whether in strategy or execution — manifests in multiple ways, including:

Low morale

High burnout rates and a lack of professional development opportunities are common (and costly) problems cited when employee satisfaction and morale are moribund.

Stunted productivity

When employees are assigned to projects that deviate from their interests and core competencies, it can quickly lead to low morale...and lower productivity rates.

Damaged customer experience

When project staffing is delayed or interrupted due to a lack of real-time visibility into employees' availability, utilization rates and/or core skills/competencies, it damages the customer experience...and satisfaction.

Operational complexity

Nothing damages employee morale — and introduces risk into a business — faster than operational complexity (examples: tech stack proliferation, department-managed tech, etc.). Often hidden until it's too late, these productivity roadblocks can have a negative impact on the operational efficiencies that keep employees productive and satisfied.

With those kinds of negative consequences, it's little wonder that optimizing deployment of resources has become a top priority for services businesses focused on cost-effective growth and improved profitability (that is, all services businesses).

The holy grail

Connecting resources to project management has long been the bane of service businesses, who regularly list it as one of their top priorities — and shortfalls. So it should come as no surprise that these businesses are looking to 21st century technology solutions to finally achieve the elusive goal of successfully matching people with projects.

The holy grail: an Advanced Resource Management platform that utilizes robust supply-and-demand automation to balance a company's resource pipeline with its project capacity. Businesses using such a solution are finally able to consistently connect assignments across practices and/or regions.

With a powerful, advanced skills management platform in place, service businesses are now effortlessly:

- Identifying the right resources for the right jobs
- Staffing projects faster
- Proactively prompting skill updates
- Identifying professional development opportunities
- Speeding time-to-delivery
- Reducing risk
- Expediting the sales-to-services handoff

By balancing resource demand with resource deployment, an Advanced Resource Management solution connects an organization's front and back offices. It seamlessly addresses the visibility issues and promotes a quick and efficient time-to-staff process that improves both employee and customer satisfaction. And, thanks to cloud consolidation and interdepartmental connectivity, it reduces the complexity of daily practices, with sales, services and other key functions operating from a single source of certainty.

Advanced Resource Management: The sum of its parts. A top-notch resource management platform covers three critical areas of resource allocation:

1. Planning: Maximizing sales/services collaboration. Drive smarter project management. End communication bottlenecks. Simplify resource scheduling. Ensure that what's sold can be delivered, today and tomorrow.

- Empower services to define and assess future resource needs
- Gain visibility into the services pipeline
- Go directly to an account or opportunity for context of a new project

2. Optimization: Gaining a unified view of supply and demand. Match projects to resources with the right skills at the right time. Understand all aspects of a resource schedule — project time, PTO, non-billable time — to optimize staffing and master project management.

- Track resource skills, certifications, and availability
- Manage change in a single, intuitive resource planner
- Monitor and configure utilization measurements to meet resource scheduling needs

3. Capacity: Reducing time on the bench. No relying on spreadsheets and guessing. Monitor capacity, backlog, and availability across projects and resource scheduling.

- Drill down to resource schedule details online 24x7
- Find, retain, and develop needed resources, now and in the future

A boon to employee retention

While the business benefits of an Advanced Resource Management solution are compelling, perhaps the greatest advantage in today's labor market is that it's a boon to employee satisfaction, morale...and retention. With a single, central platform efficiently and optimally allocating resources, employees can:

a

Surface professional development opportunities, focusing on pipeline-driven upskilling that are built into the project planning process

b

Collaborate with their managers to track and align their work aspirations to actual pipeline and business needs

c

Be "soft-booked" during the sales cycle and "auto-booked" when a deal is closed/won, because sales and service are connected on a single platform

d

Get assigned to projects according to their unique skills and career goals, reducing time-to-staff and improving the effectiveness of the project team

Experience Modern Delivery

Certinia elevates business growth through a complete Services-as-a-Business solution spanning services delivery, finance, and customer success. Native to the leading cloud platform, Salesforce, Certinia enables organizations to run a connected business, deliver with intelligence, and achieve agility at scale.

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