YOUR GUIDE

FROM OVERLOADED EXPERTS TO BALANCED TEAMS

A guide to skills intelligence

Retain



Introduction

Your best people are always busy. They get pulled into the biggest projects. They're the ones clients ask for by name. And when timelines tighten, they're the default choice because everyone trusts them to deliver.

Over time, you'll tend to see a small group carry a disproportionate share of the work, while others sit just outside the spotlight. (Capable, available, and often overlooked.)

You'll see this imbalance in the numbers. Utilisation looks uneven; project margins tighten when work slows down, or bottlenecks build; attrition risk rises for those doing the heavy lifting; and client experience starts to vary depending on who's available rather than who's best suited.

At the centre of all this is a key issue.

The problem is, firms can't see their full capability clearly enough to use it well.

- Skills data is scattered.
- Experience is hard to compare.
- Managers rely on what they know, who they've worked with before, and what feels low risk in the moment.

The result is predictable. Work concentrates. Opportunity narrows. Growth slows.

This guide looks at how firms are changing that.

Did you know? Unmanageable workload creates burnout for 41% of workers. **68%** of employees report working outside normal hours, with **45%** saying their workload increased compared to the previous year.

Burned-out employees are **2.6 times** more likely to actively seek alternative employment.

Why this keeps happening (even in mature firms)

Most firms have invested in systems, such as HR platforms, project tools, CRM, and finance. There's no shortage of data. The issue is how usable it is when you need to make a decision, especially at a time when **70%** of organisations struggle to access the skills they need.

Skills data is scattered

- HR systems
- CVs and internal profiles
- Team spreadsheets
- Manager knowledge

Each source holds part of the picture. None of them gives you a complete, up-to-date view.

Skills aren't described consistently

One team logs "financial modelling."
Another uses "forecasting."
A third lists "Excel advanced."

They might be describing a similar capability. Or completely different levels of expertise. Either way, searching becomes unreliable, and there's a lack of governance.

Project experience isn't captured in a usable way

Firms track:

- Budgets
- Timelines
- Delivery status

They rarely track:

- Which skills were used
- How often they're applied
- Whether someone stretched into new areas

So past work doesn't help much when planning future work.

Put all of this together, and you get a partial view of capability. When a new project comes in, managers rely on what they know. Who they trust. Who they've used before. That's why the same names keep coming up. They're easy to find.

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“Skills-based organisations are 79% more likely to provide a positive workforce experience and 63% more likely to achieve results compared to those without a skills-based approach.”

How skills intelligence works

When firms get this right, planning starts to feel very different. (You can search for people based on what they can actually do.) Not just their role, or who happens to come to mind first. And you can do it quickly, with enough confidence to move forward without second-guessing every decision. Here's what's behind that.

#1. A shared skills structure across the business
Everyone works from the same language. Skills are defined once, then used consistently across Audit, Tax, Advisory, and beyond. That removes ambiguity and makes it possible to compare people fairly.
What this fixes:

- Duplicate or overlapping skill names
- Confusion over levels of expertise
- Time spent translating between teams

#2. Search that reflects real capability
You can filter by:

- Skill
- Level
- Experience
- Recency of use

That changes how teams are built. Instead of scanning a shortlist based on familiarity, managers can explore a wider pool and still feel confident in the match.

#3. Visibility into how skills are developing
Planning improves when you can see more than a static profile.
You need to know:

- What someone is strong in today
- What they've worked on recently
- Where they're building new capability

That opens up more options when allocating work, especially for stretch assignments.

#4. Skills connected to project work
Skills data becomes far more useful when it links directly to delivery.
Every project adds context:

- Which skills were applied
- In what environment
- With what outcome

Over time, that builds a much clearer picture of capability across the business.

#5. A more complete view of your talent pool
When these pieces come together, the way you plan changes. You're no longer working from fragments of information. You can see who is available, what they bring, and where they fit. That's when new options start to appear.

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“55% of business leaders have begun the transition to a skills-based talent model, with another 23% planning to start within the next 12 months. 81% believe a skills-based approach increases their potential for economic growth."

The hidden talent problem (and how to surface it)

The truth is, most firms have more capability than they use. You can see it when certain skills are hard to find, yet people across the business have done similar work before. It just isn't visible at the point of planning.
This leads to several issues:

Skills are unused

- Niche expertise is buried in past projects
- Experience is logged once, then never updated
- Skills are recorded in formats that can't be searched

People build capability over time. If it isn't captured properly, it disappears from view.

People get defined by their job title

- Job title becomes the shortcut for decision-making
- Previous roles shape future opportunities
- Known strengths get repeated

That narrows the pool of people considered for each project.

High-potential talent stays on the edge of delivery

- Stretch opportunities go to the same group
- Emerging skills don't get used
- Progression slows without the right exposure

This affects engagement and long-term capability across the firm.

Work needs to be defined at a more detailed level

Firms that improve this start by breaking projects into specific capability needs. Instead of assigning a role, they define:

- The skills required
- The level needed
- The context of the work

That creates more options when building teams.

A wider talent pool becomes usable

When skills data is structured and searchable, more people come into view, so you can identify individuals who:

- Have relevant experience from previous work
- Are close to the required level
- Are ready for a stretch assignment

That expands the pool without adding headcount. It also supports growth.

Better matching becomes repeatable

Decisions improve when they are based on consistent data.

You can search, compare, and select based on evidence rather than memory. Over time, that leads to stronger team selection and more balanced use of talent across the business.

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As Deloitte puts it: “Hidden workforce capacity and capability may emerge with workers who aren't human at all... but the larger opportunity is broadening employment models and seeking out talent that may otherwise go unnoticed — those with transferable skills, or capability surfaced from past projects." — **Deloitte, Hidden Workforce Capabilities, 2025**

Balancing workloads without burning out your best people

Uneven workload is easy to spot once you look for it. A small group stays fully booked. Others have capacity that never quite gets used. Projects move forward, but pressure builds in the same places again and again. Work tends to concentrate because it feels safer. When deadlines are tight, managers go back to people they trust and have worked with before. It keeps things moving in the moment, even if it creates longer-term strain.

Visibility changes that dynamic.

When you can see skills and capacity together, the pool of viable options gets wider. Managers can look beyond their usual shortlist and compare people based on real experience, recent work, and availability. That makes it easier to assign work without second-guessing every decision.

Confidence plays a big role here.

If you're unsure about someone's experience, you default to the safe option. When skills data is clear and current, that hesitation drops. You can see who has done similar work, how recently they've done it, and where they're ready to step up. That context supports better decisions without slowing things down.

Over time, the workload starts to even out. Fewer bottlenecks form around key individuals. Available capacity gets used more effectively. Teams deliver more consistently because work is spread across people who are actually suited to it.

Plans will always change. Projects move, priorities evolve, and new demands come in.

That's why a live view of workload is key. You need to see who is booked, where pressure is building, and where capacity exists before it gets filled. Small adjustments early on prevent bigger issues later.

This is where firms start to feel the impact. Not through a single decision, but through better decisions happening every day.

Skills + development: turning every project into growth

Most capability is built on the job. People develop through client work. New industries, new problems, new responsibilities. That's where skills get tested and strengthened. The issue is how little of that gets captured.

Development happens during delivery
Formal training plays a role, but it's only part of the picture. Day-to-day project work is where people stretch. They take on unfamiliar tasks, work alongside more experienced colleagues, and build confidence in real situations. That learning adds up quickly. It just isn't always visible outside the project team.

Most firms don't track it properly
Project delivery is measured closely, including budgets, timelines, and outcomes. What's missing is a consistent way to record how individuals contributed and what they developed along the way. So when the project ends, that insight disappears.

What gets tracked vs what gets missed

Tracked today	Often missed
Project delivery	Skills used on the project
Budget and timelines	Level of contribution
Outcomes	New capability developed

The problem is that when development isn't visible, it's hard to factor it into resourcing decisions. Managers can't easily see who is ready for the next level, or who has already started building relevant experience. Opportunities tend to go to people with an established track record, even when others are close to being ready.

That slows progression and narrows the pool of people considered for more complex work.

When development is visible, planning improves
Firms that capture this data gain a much clearer view of their workforce. They can see what people have done, how their skills are evolving, and where they're ready to step up. That makes it easier to assign stretch work with intent, rather than by chance. Over time, capability builds in a more balanced way across the business.

What to look for in a skills-driven platform (a quick checklist)

Most firms know they need better visibility. Fewer know what to actually look for when evaluating tools. Use this as a quick checklist:

✓ **You can match people based on real capability**
You can search by:

- Skills
- Experience
- Availability

And get results quickly. That's what allows teams to assign the right people to the right work, rather than relying on availability alone.

✓ **You can see capacity across the whole business**
You have a clear view of:

- Who is available
- Where the workload is building
- Where spare capacity exists

Without that, decisions stay local to individual teams. Firms that get this right can balance work more evenly and avoid overloading the same people.

✓ **You can plan ahead, not just react**
You can:

- Forecast demand
- Identify pressure points early
- Reallocate work before issues build

This is what keeps projects on track during peak periods and reduces last-minute reshuffling.

✓ **You can adapt quickly when plans change**
Work doesn't stay fixed for long.
You need:

- Real-time updates
- Flexible scheduling
- The ability to adjust allocations quickly

That's what keeps delivery moving when priorities change mid-project.

✓ **You can use your full talent pool**
You can:

- Find specialists when you need them
- Bring in people from different teams or locations
- Allocate junior talent to the right work

This improves utilisation and helps teams collaborate across the firm.

What to look for in a skills-driven platform (a quick checklist)

✓ **You can support development through real work**
You can see:

- What people have worked on
- How their skills are developing
- Where they are ready to take on more

That makes it easier to assign work that builds capability over time.

✓ **You can build more consistent teams**
You can:

- Recreate successful team combinations
- Balance experience levels
- Maintain continuity for clients

This leads to more stable delivery and stronger client relationships.

✓ **You can reduce planning time**
You're not:

- Pulling data from multiple systems
- Manually checking availability
- Reworking plans repeatedly

Instead, decisions happen faster, with fewer back-and-forth steps.

If a platform meets most of these criteria, you're in a strong position. If it doesn't, the same issues tend to persist.

From soloists to scalable teams

When you can see skills clearly, track how they're developing, and connect them to real work, planning becomes more precise. More people come into view. And more options open up when building teams.

That's where scale comes from.

You're no longer relying on a handful of individuals. You're working with a broader, more accurate view of your capability. Teams become easier to assemble. Work gets distributed more evenly. Development happens alongside delivery, not separately.

The impact builds over time.

Stronger utilisation. More consistent delivery. Better use of the talent already in the business.

And a model that can handle growth without putting the same pressure on the same people.

See how this works in your firm
You've seen where the pressure builds and how leading firms handle it. The next step is to see what this looks like with your own teams, your own data, and your own way of working.



In a tailored session, you can:

- See your current resource picture more clearly
- Identify where work is concentrating and why
- Explore how skills data can improve allocation decisions

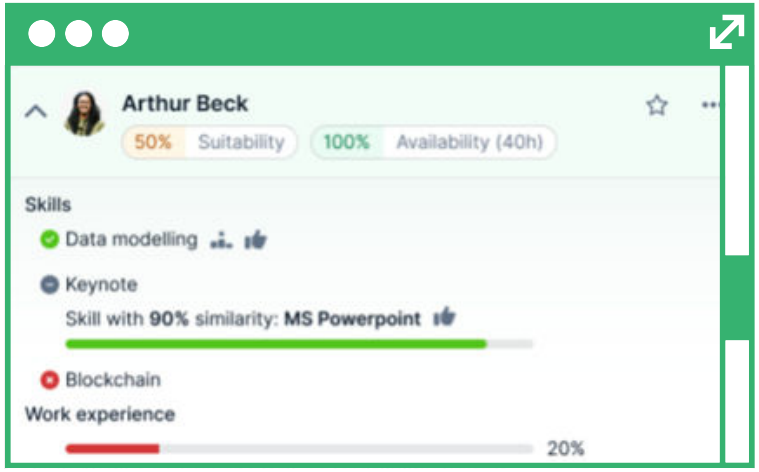
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Technology for skills intelligence

Workforce complexity keeps increasing, demand moves, skills change, and client expectations stay high. Meanwhile, teams are expected to respond quickly, with the right expertise in place from the start. To manage that, you need a clear view of three things at once: what skills you have, what work is coming, and how people are deployed.

That's where Retain comes in.

Retain Cloud brings skills, demand, and capacity into one place, so resource decisions are based on current, reliable data rather than assumptions or memory.



With Retain, you can:

Build a consistent view of skills across the business
- Define skills once and use them across teams
- Match people to work based on experience and proficiency
- Find expertise that would otherwise be missed

See demand and capacity in real time
- Track bookings, availability, and utilisation as they change
- Spot pressure points early
- Plan ahead with more confidence

Assign work with more precision
- Compare suitability alongside availability
- Reduce time spent coordinating staffing
- Make decisions that are consistent and easy to explain

Work across systems without duplication
- Connect with HR, finance, and project tools
- Keep workforce, project, and performance data aligned
- Avoid gaps between teams and departments

Use data to guide decisions over time
- Track utilisation and delivery performance
- Identify where capability is strong or needs support
- Support hiring and development planning with real evidence

When skills are visible and connected to delivery, teams are easier to build, work is distributed more evenly, and capability grows in a way that supports the business as it scales. That's what skills intelligence makes possible.

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NEXT STEPS

Explore how Retain can help you to effectively allocate resources, cost management, and financial projections.

To learn more visit:
https://www.retaininternational.com

If you're ready for that next step, you can book a demo here.

