YOUR GUIDE

# THE ART OF RESOURCE MANAGEMENT MATURITY

Advancing from practice to performance

Retain



# Optimise your most valuable investment

Industry figures reveal a stark reality: businesses typically spend between **40%** to **80%** of their gross revenue on employee compensation. With such substantial investment, best practice resource management should be at the top of every organisation's priority list.

The Resource Management Institute (RMI) advocates a proven method to address this challenge: **improving your resource management maturity.**

This journey begins with a critical first step: assessing your current position—your baseline. From this starting point, you can create strategic plans and set in motion the advancement of your resource management maturity.

Once you have evaluated your baseline, you can then build organisation support and **begin the process of continuous improvement.**

**To guide you through this process, this ebook will explore:**

- The four stages of our maturity model
- How to evaluate what your baseline is today
- Strategies to move up the resource management maturity curve

You'll be able to pinpoint where you are right now and plot a course to move towards best practices. **And the great news is, each step forward brings you more benefits**—better use of resources, lower costs, improved project delivery, and a smart approach to strategy.

# What is resource management maturity?

**Resource management maturity defined:**
Resource management maturity refers to the level of sophistication and effectiveness an organisation has achieved in managing its human resources. It includes the processes, tools and strategies used to allocate, track and optimise resources across projects and operations.

As organisations progress through higher maturity levels, they move from reactive, manual approaches to more proactive, automated and strategic resource management methods. These advancements lead to **improved efficiency, better decision-making and increased ability to align resources with business objectives.**

Understanding and improving resource management maturity is crucial for organisations, yet **it's not always straightforward**. Project and resource managers often struggle to get the go-ahead from leadership teams for new technology investments and process improvements. **This is where the concept of resource management maturity becomes really valuable.**

By clearly identifying and providing evidence of your current maturity level, you can effectively demonstrate the tangible benefits of advancing along the maturity curve. This approach justifies investments and highlights the potential for **significant improvements in resource utilisation, cost efficiency and overall organisational performance.**

Introducing the **resource management maturity model**



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# The resource management maturity model

## STAGE 1

**Data drudgery and spreadsheet monotony**

- Relies on manual processes and spreadsheets
- Resource allocation via Excel
- No or inaccurate forecasts
- Record keeping is manual and disconnected
- High risk of double bookings and conflicts

## STAGE 2

**Emerging automation**

- Use of non-specialised tech
- Partial automation with Excel and other tech
- Scheduling requires manual work
- Improved team communication via software
- Limited visibility and data insights due to silos
- Ad hoc reporting

## STAGE 3

**Well-coordinated resource management**

- Standardisation of data /processes
- System integration (ERP, CRM, etc.)
- Practitioners validate system recommendations
- Real-time dashboards for cost/utilisation insights
- Cross-functional collaboration
- Proactive resource planning
- Customised reporting
- Quicker response to resource demand changes

## STAGE 4

**Strategic world-class resource management**

- All resource management processes automated on one intelligent system
- Specialised, integrated tech ecosystem
- AI-enabled precise on-demand forecasting
- Project teams created based on psychometrics
- Pre-emptive project costings
- Resource optimisation using AI
- Low effort for high impact

# The four levels of resource management maturity

The Resource Management Maturity Model consists of four distinct stages, each representing increasing levels of sophistication and effectiveness. These stages are:

1. **Manual Resource Management**
2. **Basic Resource Management**
3. **Connected Resource Management**
4. **Strategic Resource Management.**

As organisations progress through these stages, they move from reactive, spreadsheet-based approaches to more proactive, integrated, and AI-driven methods of managing their resources.

With this model as your guide, you can easily assess your current abilities and spot the practical steps needed to level up. The beauty of moving up the stages is the unlocked benefits: think better use of resources, cost savings, smoother project delivery, and more agility in your strategy.

Moving through these stages means you're turning resource management from a hands-on task to an optimised, strategic function.

To help you work out where your firm fits, in the next sections, we will explore the four stages of the model in more detail.



# Stage 1.
# Manual resource management

At the starting line, resource management is pretty hands-on. It's all about manual processes, spreadsheets, and email exchanges. But let's be honest, it can feel like you're stuck in a never-ending cycle of data overload and death by spreadsheets.

- Resource allocation is done through **basic Excel spreadsheets**. This relies heavily on manual work by resource managers and project teams.
- There are **no forecasting capabilities and manual forecasts are inaccurate**. This means resource managers cannot predict upcoming resource needs.
- Everything is recorded manually, often across **disconnected spreadsheets**. This creates an unreliable audit trail and a lack of a single source of truth.
- There is a high risk of double bookings and resource conflicts, leading to **reactive firefighting**.
- Without forecasting, **resource managers can't be proactive**. They can only respond reactively to urgent resource gaps or conflicts.

When you're relying on this manual approach, resource management data ends up cooped up in its own little world, processes feel like a broken record on repeat, and problems only get attention after they've popped up. It's clear that it's time to level up to *at least* basic resource management software, to bring a bit of transparency and control into the scene.

# Stage 2.
# Basic resource management

This is where you start using basic software and get your first taste of automation. But if we're honest, it's like dipping your toes in the water. Disconnected processes and manual work is still the name of the game.

- There is usually **a patchwork of Excel spreadsheets and non-specialised technology** that only automates parts of the process.
- Scheduling and resource allocation still require **extensive manual work**. Resource managers must input and update data.
- Communication between teams is improved through notifications and alerts, but **there's still a lack of cross-functional comms**.
- There's increased visibility into resources compared to only manual methods. However, **firms are still reliant on basic or non-specialised technology**.
- **Data and insights are limited** as information sits in organisational silos.

At this stage, while you've waved goodbye to strictly manual methods, resource management is still a bit like playing catch-up, addressing things as they come up. And although the tech is definitely a step forward, it's not providing the *full visibility* or the complete automation that's really needed for top-notch strategic resource planning.

# Stage 3.
# Connected resource management

At this enhanced stage, resource management becomes a smooth operation, all thanks to the power of integration and standardisation.

- Resource management data and processes are standardised across the organisation. This enables **a single source of truth**.
- **Systems are integrated**, connecting resource management software with ERP, CRM, project management and other platforms.
- **Practitioners validate and confirm recommendations** made by the system for resource allocation and scheduling.
- **Real-time dashboards provide insights** into resource utilisation, costs and emerging data trends.

At this stage, you gain a complete view of the entire resource management process. It's fully automated, but human insight still plays a crucial role in ensuring the best results.

Making it to this level is a big win for resource management efficiency and optimisation. But for firms aiming to unlock even more strategic value, the next stage is a game changer with its advanced capabilities.

# Stage 4.
# Strategic resource management

At this top-tier stage, firms adopt strategic resource management that's world-class, thanks to the full automation of resource management software and the smart optimisation power of AI.

- All resource management processes are automated on **a single, intelligent platform powered by AI.**
- The technology ecosystem is specialised for professional services and **integrates seamlessly with other systems**.
- Advanced capabilities enable **precise forecasting of on-demand resource needs**.
- Projects can be **pre-emptively costed based on forecasts** before work begins.
- Algorithms and **predictive analytics optimise resource allocation** and utilisation.
- Operations teams expend **minimal manual effort to get maximum impact.**

When you reach this level, resource management isn't just running on autopilot, it's also fine-tuned to perfection. You can model and prep for different scenarios, aligning resources flexibly to meet business goals. The competitive edge you unlock at this stage boosts profitability, efficiency, and agility.

**How do you achieve this level of maturity?** Request a no-obligation consultation to see what a good resource management process can look like for your company. Book a demo.



Where does ***your organisation*** sit on the resource management **maturity curve?**



QUICK CHECKLIST:

# How to evaluate your maturity baseline

Our resource management maturity model gives companies a solid framework for giving their current capabilities a good, honest look.

So, if you're ready to put your resource management under the microscope, here are some questions to get you started:

- Is resource management still driven by manual processes and spreadsheets? Or is data integrated across systems?
- Is resource forecasting and allocation reactive or optimised using AI-powered algorithms?
- Does the software provide complete visibility or only cover parts of the process?
- Can you run scenarios and simulations for strategic planning? Or is scheduling done manually?
- Are there gaps between systems causing information silos? Or is there a single source of truth?
- What percentage of resource management work is still manual? What is automated?
- How quickly can your firm adapt to changing resource needs and client demands?

By tackling these questions, you'll get a clear picture of where your company fits in the maturity curve. Knowing where you are now is a must for figuring out the step-by-step journey to the next level.

For instance, moving from manual spreadsheets to the right resource management software delivers a huge leap in efficiency. Integrating systems and applying AI optimisation unlocks even further strategic value.

# Moving up the resource management maturity curve

Once you have a clear idea of your firm's current resource management maturity, the next step is crafting a roadmap to reach the next stage.

Resource management maturity comes down to mastering a set of key capabilities in the right combinations—not only utilisation, scheduling, and automation, but also in talent and culture. This includes 'foundational' capabilities—like cloud platforms and tools, data, and governance. It also includes 'differential' capabilities, like AI scheduling, advanced reporting, and more.

Resource management high achievers are deploying solutions to solve problems, spot opportunities, and outperform their peers. They've taken their agenda beyond improving utilisation to driving growth and innovation.

**Here are some handy tips to help you along the way:**

- **Get the execs on board**. Gain executive buy-in for change by quantifying current inefficiencies and presenting the maturity model.
- **Tackle the basics first**. Start with foundational issues first, such as integrating systems, and eliminating spreadsheet chaos.
- **Lean on the right tech**: Introduce the right resource management software, which can scale and grow with you.
- **Keep teams in the loop**: Involve operations teams closely in each stage to drive adoption.
- **Offer training**: Provide proper training and support to help employees adjust to new processes.
- **Keep an eye on metrics**: Measure metrics like resource utilisation and project margins to quantify improvements.
- **Celebrate small wins**: No matter how big or small, to maintain momentum for digital transformation.

We've created the maturity model as your roadmap. Every step you take towards the next stage is an investment that brings outsized long-term rewards.

# Resource management maturity, accelerated.

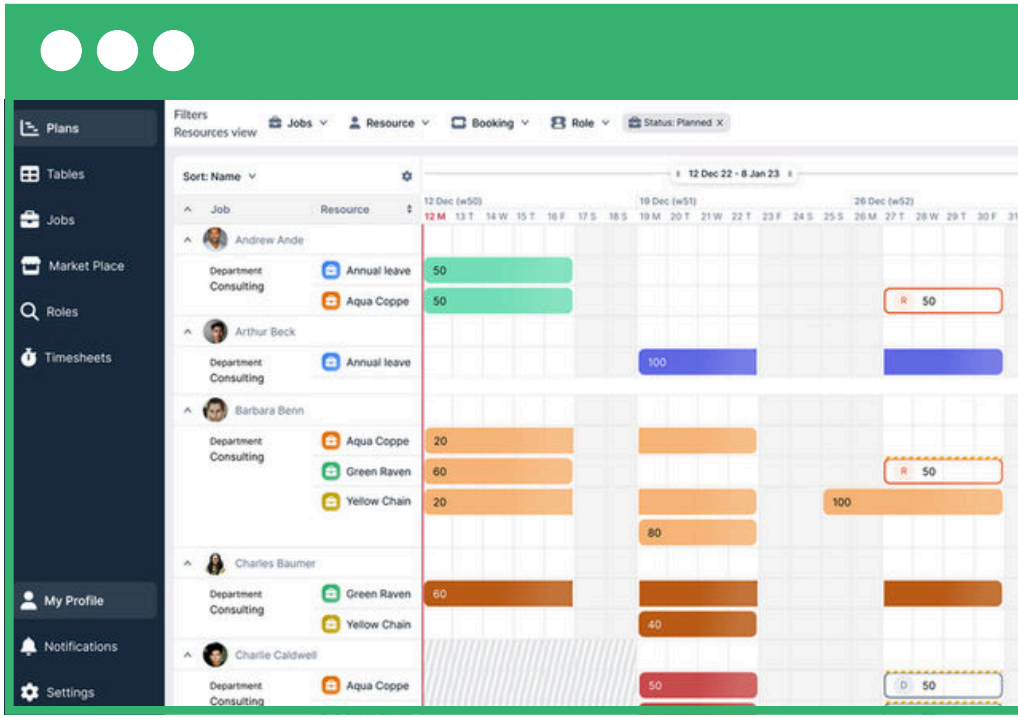
The race towards resource management excellence is on, and the frontrunners are reaping substantial rewards. Across industries, high-performing organisations have rapidly progressed beyond basic resource optimisation to achieve robust forecasting and strategic control at an enterprise level.

At the heart of this acceleration is cutting-edge technology. Solutions like **Retain** harness the power of cloud computing to dramatically speed up the journey through the maturity stages.

**These tools offer:**

- Immediate access to advanced resource allocation algorithms
- Real-time data integration for accurate forecasting
- AI-driven insights that uncover hidden opportunities
- Enterprise-wide visibility and control

All of this is achieved while maintaining the highest standards of security and data protection.



However, technology alone isn't the silver bullet. The true differentiator lies in how organisations approach and implement these technological solutions. Top performers understand that accelerating resource management maturity requires a holistic approach:

- It's about aligning people with powerful technology
- It's about integrating strategy with cutting-edge implementation
- It's about balancing responsibility with the agility that modern tools provide

By leveraging solutions like Retain, organisations can leapfrog multiple maturity stages, setting new benchmarks for high performance as they evolve. This technology-driven approach transforms a traditionally slow process into a dynamic, strategic advantage.

**Ready to accelerate your resource management maturity?**
Discover how Retain can propel your organisation to the forefront of resource management excellence.



# Final key takeaways

Here are some key points to remember:

- The Resource Management Maturity Model comprises four stages: Manual, Basic, Connected, and Strategic. Knowing your current stage is crucial for planning your progress to the next level. (Plus you can skip stages with the right tech)
- Moving to higher stages brings great benefits, such as increased efficiency, cost savings, and a competitive edge. But remember, this progress requires commitment from executives, support from employees, and a carefully planned approach.
- Investing in advancing your resource management maturity offers significant long-term benefits.

Click to start your journey.👇

Request your demo now



The model gives your firm a clear framework to benchmark capabilities and transform resource management from a manual task to an optimised, strategic function.

**Ready to level up to strategic resource management?**
With Retain's resource management software, you can get the capabilities of the highest maturity stage right from the get-go. Find out more or book a demo.

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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.

