



RMI *Survey Series*

Skills Tracking and Management

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AGENDA



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PS/CS - Professional/Consulting Services
MA - Marketing Agencies
AATA - Accounting/Audit/Tax/Advisory
LF - Law Firms
E/IT - Enterprise/IT
PD - Product Development

Survey Background

- 1 This was the third survey on Skills Tracking and Management and now expanded to include six different project-based domains. This survey was conducted in 4Q/2022.
- 2 Input was provided by services executives, resource managers and resource management office leadership, project managers, and production managers from 52 different companies across Professional/Consulting Services; Enterprise/IT; Product Development; Marketing Agencies; Accounting, Audit, Tax, and Advisory; and Law Firms.
- 3 Professional/Consulting Services and Enterprise/IT Services made up 75% of the respondents. Recently added to the Survey Series is input from Accounting, Audit, Tax and Advisory Firms, and Law Firms. These project-based domains share many of the same RM challenges offering good cross-industry perspectives leading to improved best practices.
- 4 For analysis purposes, responses to this survey were organized into two segments: companies that serve external customers (Professional/Consulting Services; Marketing Agencies; Accounting, Audit, Tax, and Advisory; and Law Firms) and those that serve internal customers (Enterprise/IT Services and Product Development).



Survey Question

01 What type of organization do you represent?

- a) Professional or Consulting Services (PS or CS)
- b) Marketing Agency (MA)
- c) Accounting/Audit/Tax and Advisory (AATA)
- d) Enterprise IT (EIT)
- e) Product Development (PD)
- f) Law Firm (LF)

02 Which option best describes your role?

- a) Resource Manager
- b) Project Manager
- c) RMO or PMO Leader
- d) Delivery Leader
- e) Operations
- f) HR
- g) Other

03 How many resources in total does your organization manage collectively with all resource managers?

- a) <50
- b) 50-99
- c) 100-199
- d) 200-499
- e) 500-999
- f) 1000+

04 Does your current skills database effectively support your business needs?

- a) Yes
- b) No

05 Who owns the skills database in your organization?

- a) RMO
- b) PMO
- c) Other delivery function
- d) HR
- e) Other

06 How many roles do you define in your delivery organization?

- a) <50
- b) 50-99
- c) 100-199
- d) 200-499
- e) 500-999
- f) 1000+

07 Do you have skills defined for each role?

- a) Yes
- b) No

08 How many different skills do you track?

- a) <50
- b) 50-99
- c) 100-199
- d) 200-499
- e) 500-999
- f) 1000+

09 What categories of skills do you track? (check all that apply)

- a) Product knowledge
- b) Platform or systems knowledge
- c) Industry knowledge
- d) Soft skills
- e) Language skills
- f) Third party tools and technologies
- g) Certifications
- h) Delivery capabilities
- i) Other

10 How many proficiency levels do you track?

- a) 1
- b) 2
- c) 3
- d) 4
- e) 5+
- f) We don't track proficiency levels

11 How often do employees update their skills in the skills database? (check the answer closest to what you require)

- a) Monthly
- b) Quarterly
- c) Annually
- d) Ad hoc
- e) Employees don't input their own skills information
- f) We don't have a skills database

12 How is skills information in the skills database validated?

- a) By managers
- b) By SMEs of skill areas
- c) Employees validate their own skills
- d) Skills are not validated
- e) Other

13 How do you physically store your skills database? (check all that apply)

- a) Commercial PPM/PSA/RPM system
- b) HCM system
- c) Homegrown system
- d) Excel/Access
- e) We don't have an electronically stored skills database

14 As input to your resource management planning, which of the following do you track? (check all that apply)

- a) Project interests of delivery personnel
- b) Specific project requests from delivery resources
- c) Career interests of delivery resources
- d) None of these

15 What do you use skills data for? (check all that apply)

- a) Project assignment
- b) Forecasting
- c) Career planning and development
- d) Other

16 Are there any regulatory issues (governmental) or other important considerations (e.g. labor groups or unions) preventing or limiting your organization from deploying a skills inventory?

- a) No
- b) Yes (please specify what is preventing your ability to deploy a skills inventory)

17 We are satisfied with our PSA/PPM/RPM tool(s) regarding capabilities for skills tracking and management?

- a) Very satisfied
- b) Somewhat satisfied
- c) Not satisfied
- d) Searching for a new tool now or soon in the future

18 Our highest priority for PSA/PPM/RPM improvements related to skills management and tracking is:

- a) Better flexibility for our skills hierarchy
- b) Improved analysis capability
- c) Better automated support for staffing selection prioritization based on employee or management input
- d) Systems or application consolidation/integration
- e) Other

Key Takeaways

- 1 Similar to our previous two surveys on this topic, the majority of companies, regardless of domain, continue to feel their skills tracking and management capabilities are areas for improvement. Addressing the basics of being able to characterize resource supply through role definition and building and managing an effective skills database continue to be among the top challenges to achieving RM effectiveness.
- 2 The technology supporting skills tracking and management is getting better, but improvements are still needed to reduce the use of spreadsheets and provide more support for automated staffing, analysis capabilities, and most recently more attention being paid to the growing overlap of information between today's PSA/PPM tools and HR systems like HCM tools.
- 3 While there are clear best practices for the creation, maintenance, and management of skills data to support Just-in-Time Resourcing® capabilities, this survey highlights this area as a critical gap that continues for the industry as a whole. The RMI will continue to emphasize this foundational area and provide help and education to assist with improvement.



SERVICES TEAMS SERVING EXTERNAL CLIENTS

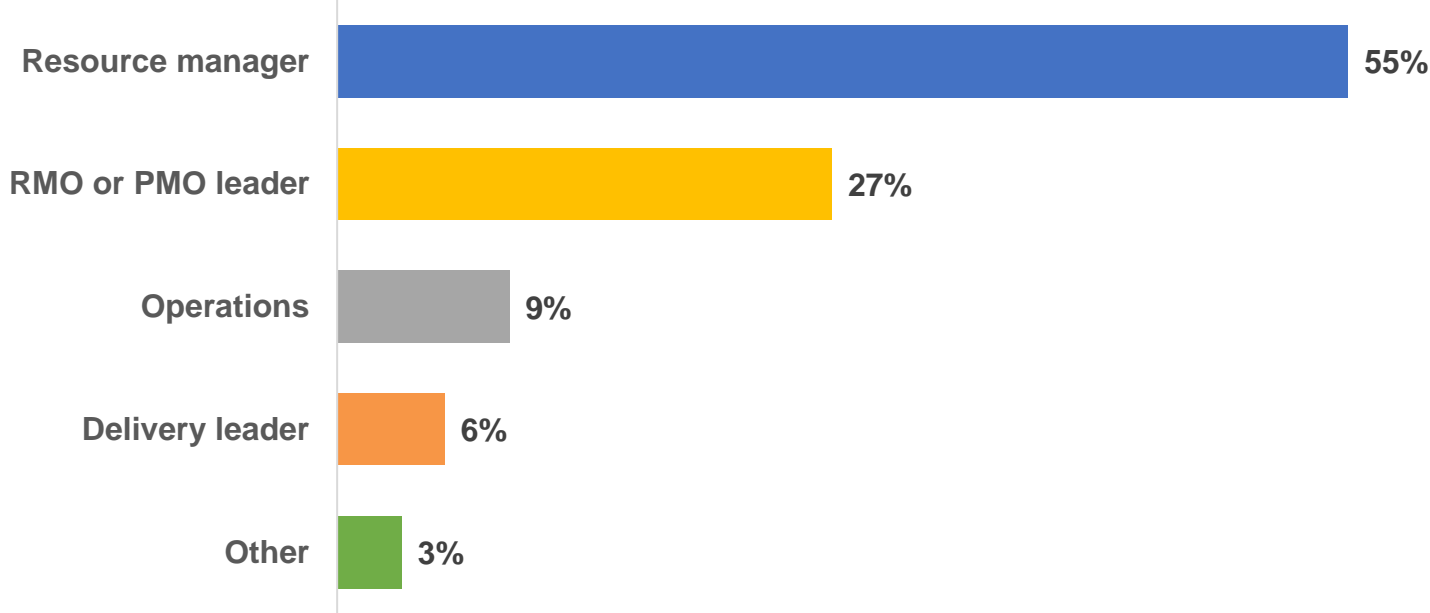
Professional/Consulting Services (PS/CS)

Marketing Agencies (MA)

Accounting/Audit/Tax/Advisory (AATA)

Law Firms (LF)

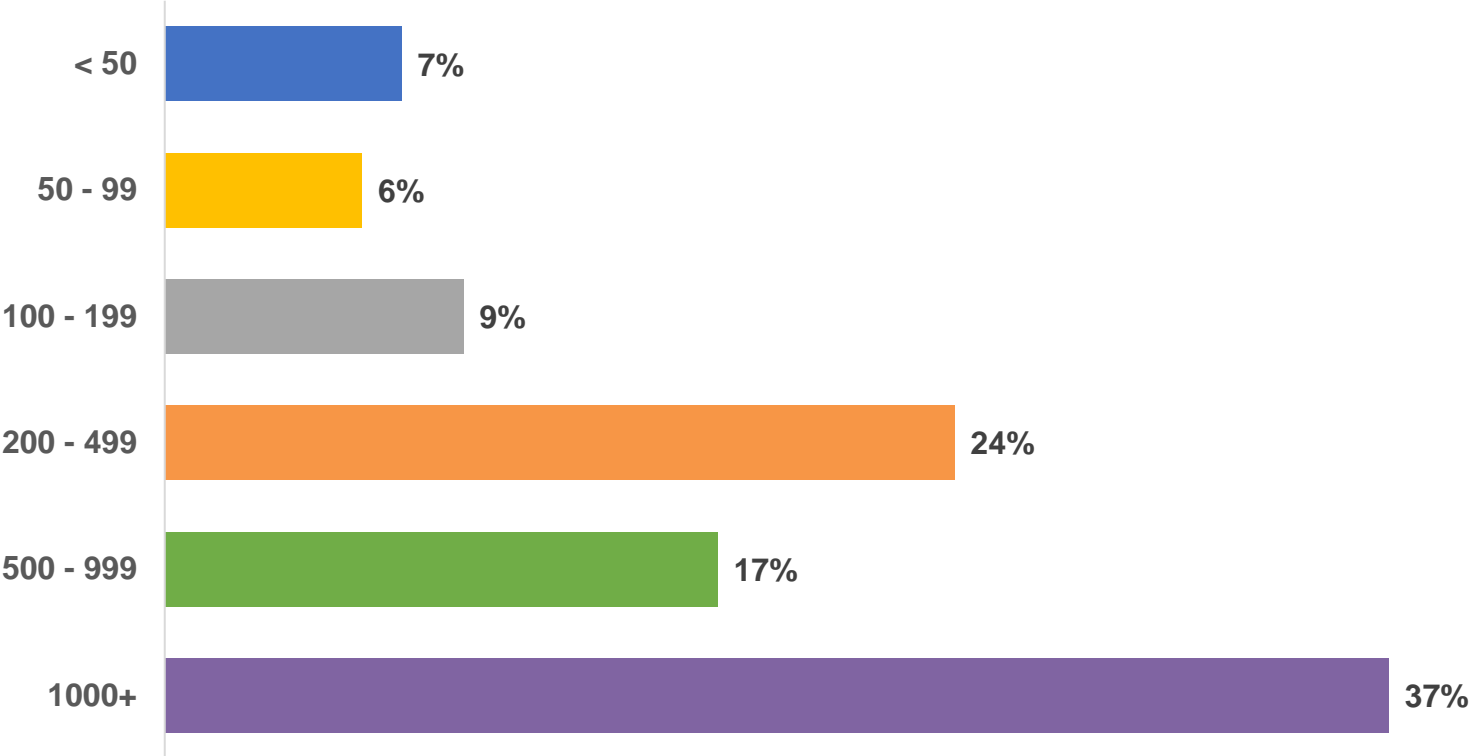
Q2: Which option best describes your role? – PS/CS, MA, AATA, LF



New to the survey this year, respondents were asked to provide information on their role; 82% stated they are either Resource Managers or RMO/PMO leaders within their organization.

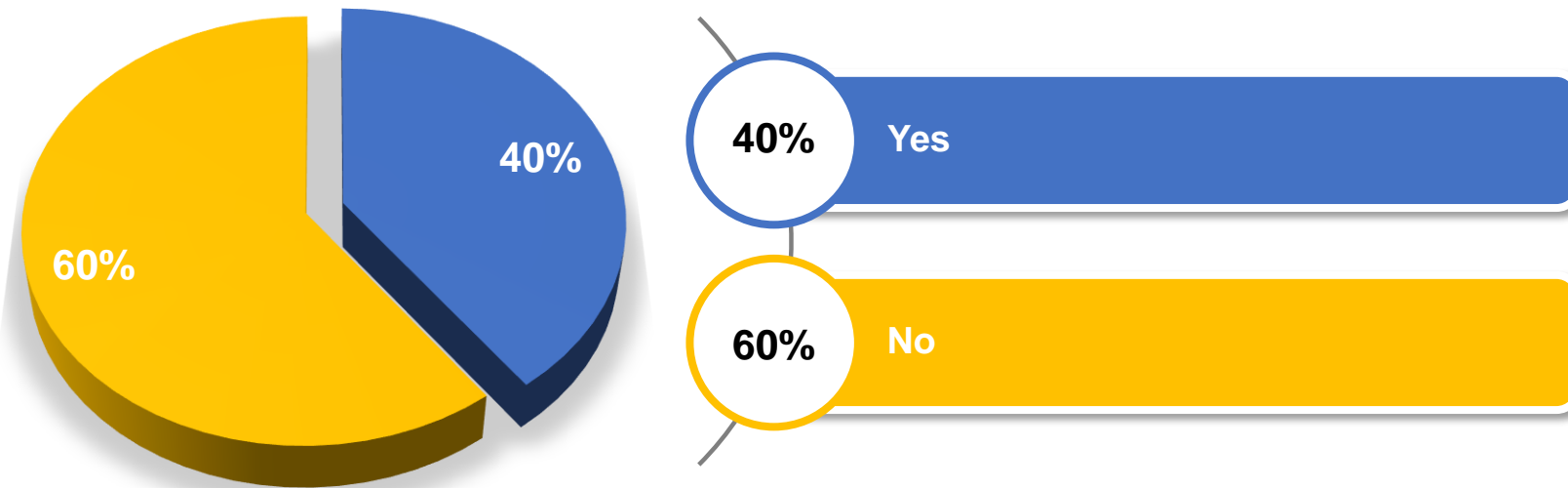
- Other:
- Services Manager
 - Resource Manager/Operations
 - Business leader

Q3: How many resources in total does your organization manage collectively with all resource managers? – PS/CS, MA, AATA, LF



We had a good cross-section of different size organizations responding to the survey.

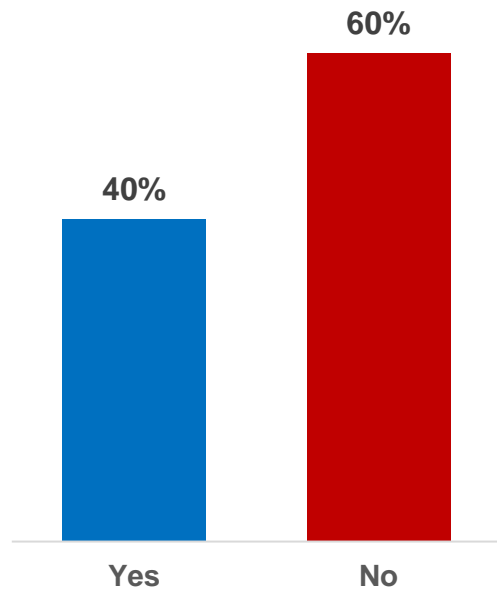
Q4: Does your current skills database effectively support your business needs? – PS/CS, MA, AATA, LF



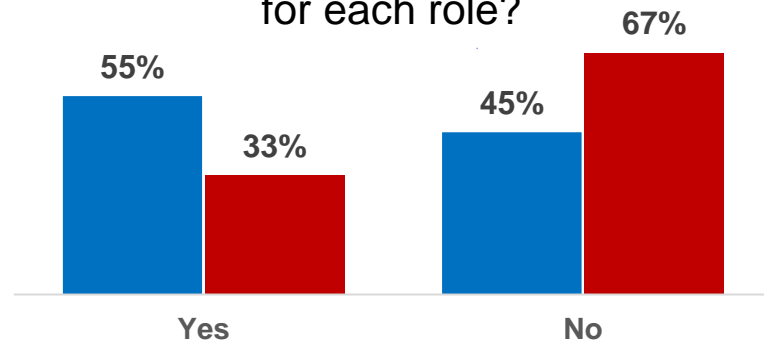
Similar to our previous surveys on this topic, 60% of respondents indicated the skills database capability in their organization was a pain point. Since an effective skills database is essential to planning the allocation of human resources, addressing this shortfall should be a high priority.

Analysis (PS/CS, MA, AATA, LF): The leaders in creating and using an effective skills data base do the following:

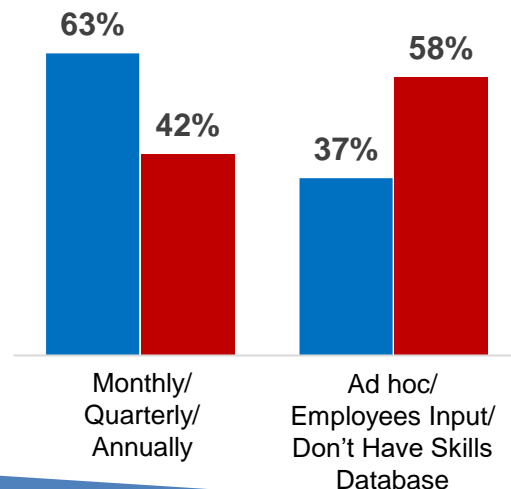
Does your current skills database effectively support your business needs?



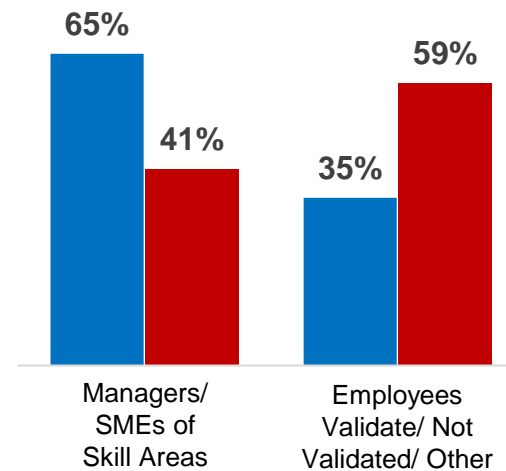
Do you have skills defined for each role?



How often do employees update their skills in the skills database?



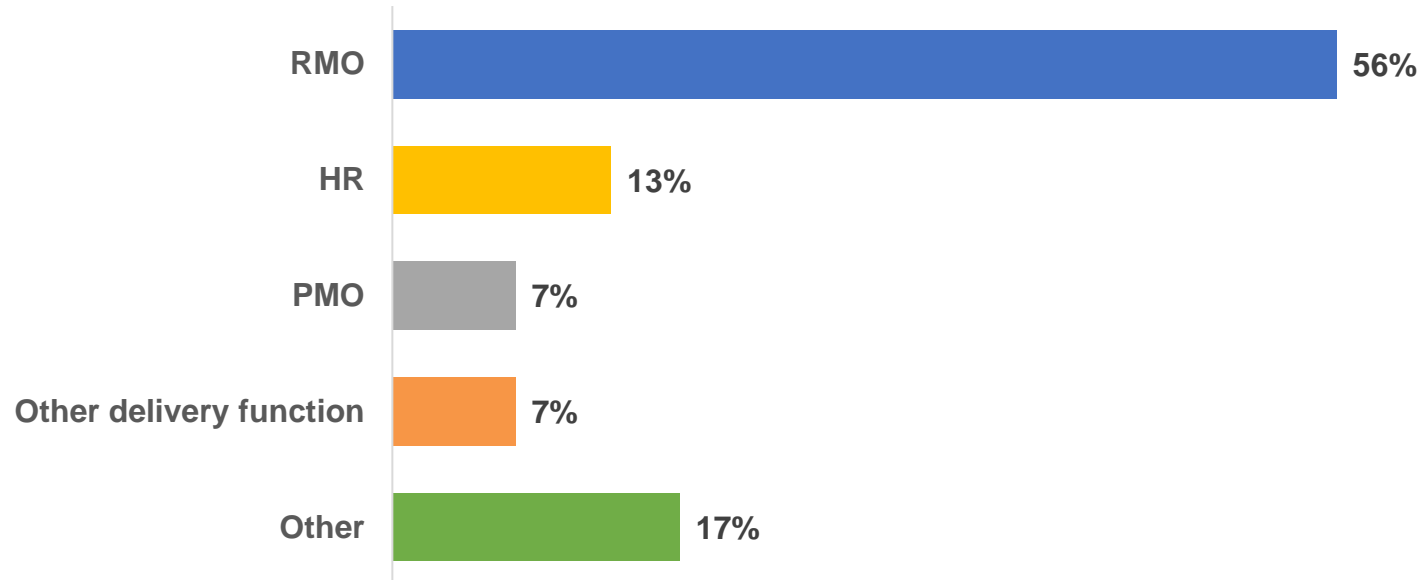
How is skills information in the skills database validated?



Three RMI recommended practices for building and maintaining an effective skills database were confirmed with this survey data:

- 1) Defining skills by role
- 2) Regular skills updates by employees
- 3) Processes in place to ensure proper validation of employee skills data by management or SMEs

Q5: Who owns the skills database in your organization? – PS/CS, MA, AATA, LF

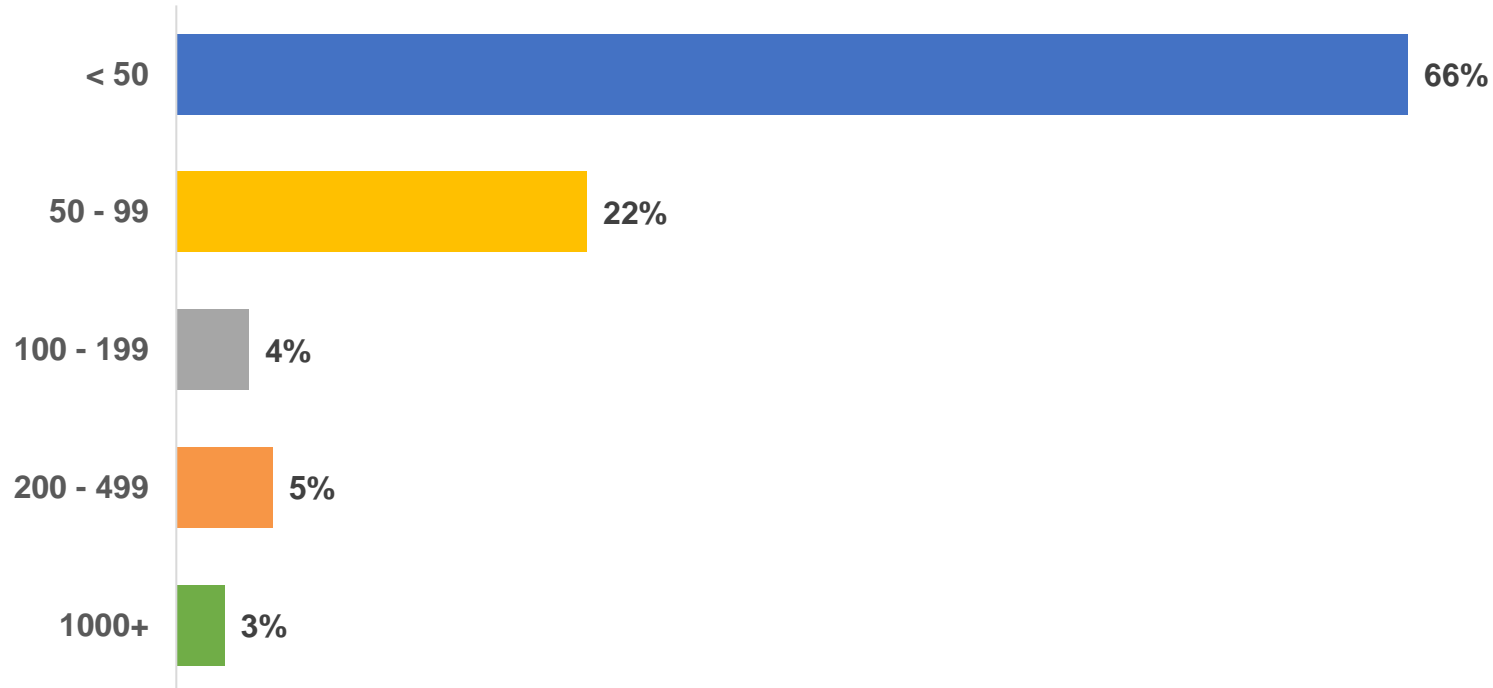


The RMO is the ownership point of choice for more than half the respondents. This is an RMI recommended practice. With 17% indicating 'other' it does provide evidence as to the continuing industry challenges around fragmented or unclear ownership of this important resource management building block. The RMI believes the RMO will continue to grow in influence for this important resource management process building block.

Other:

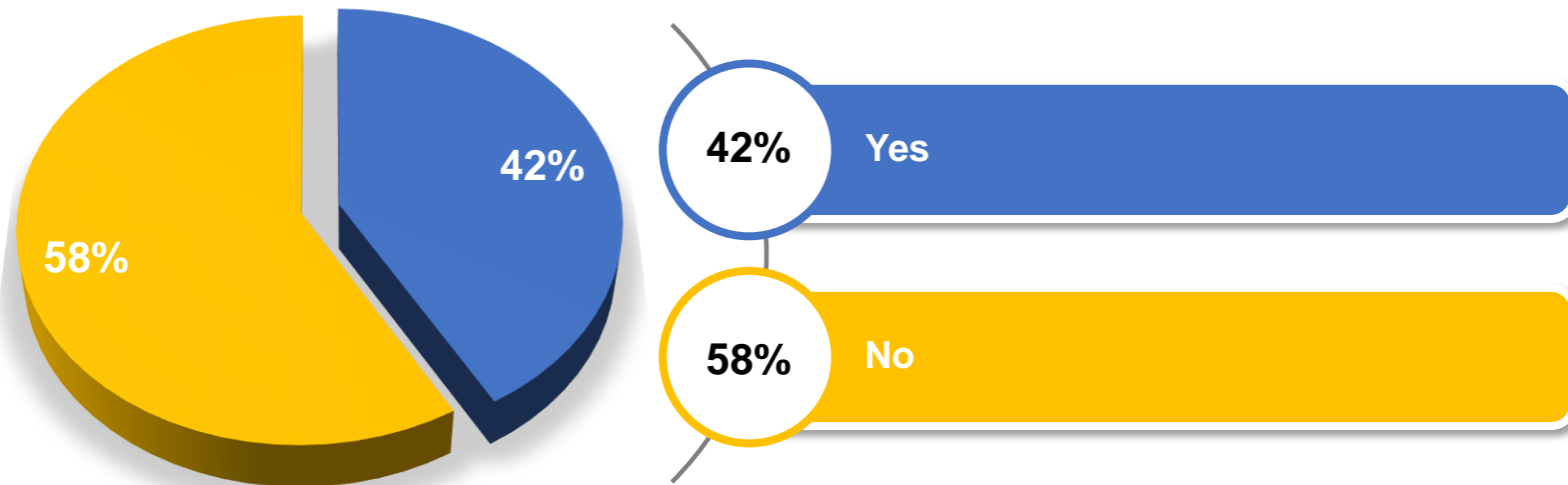
- Special HR team owns the information
- No one owns it / no skills database
- Our RMO owns an off-shoot of skills, but it isn't robust enough for staffing; HR owns all skills information.
- Almost anyone
- Purchased a software tool that our RM team is managing
- Supervisors
- Skills are tracked independently at varying levels
- My team, it is an in-house solution
- Delivery organization
- Role excellence
- None currently, will be the RMO once new tool is implemented.

Q6: How many roles do you define in your delivery organization? – PS/CS, MA, AATA, LF



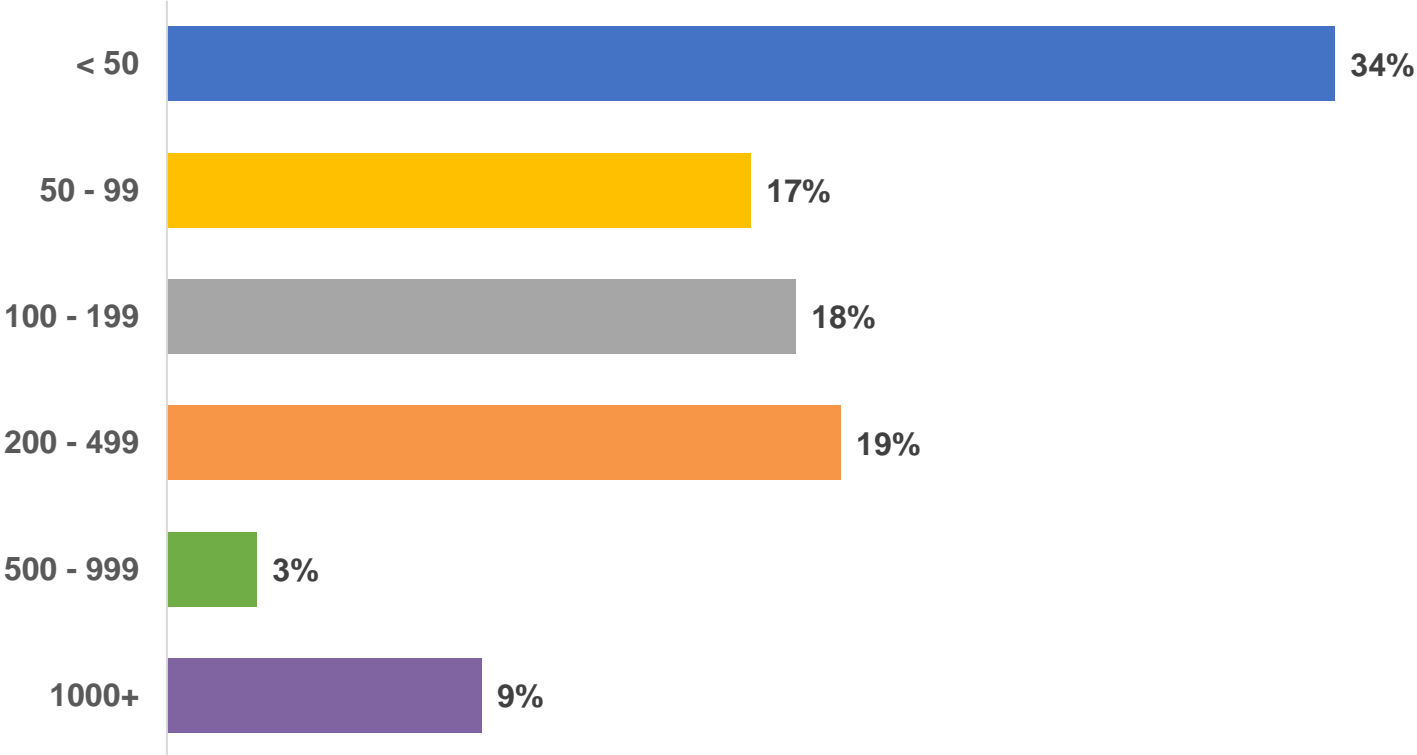
Role definition is an important aspect of characterizing resource supply. The process of defining roles and skills is as much an art as a science. The key is to have enough granularity to enable planning while ensuring they do not become too cumbersome to effectively manage and maintain. Two-thirds indicate they have less than 50 roles defined in their organization, which is in line compared to previous years.

Q7: Do you have skills defined for each role? – PS/CS, MA, AATA, LF



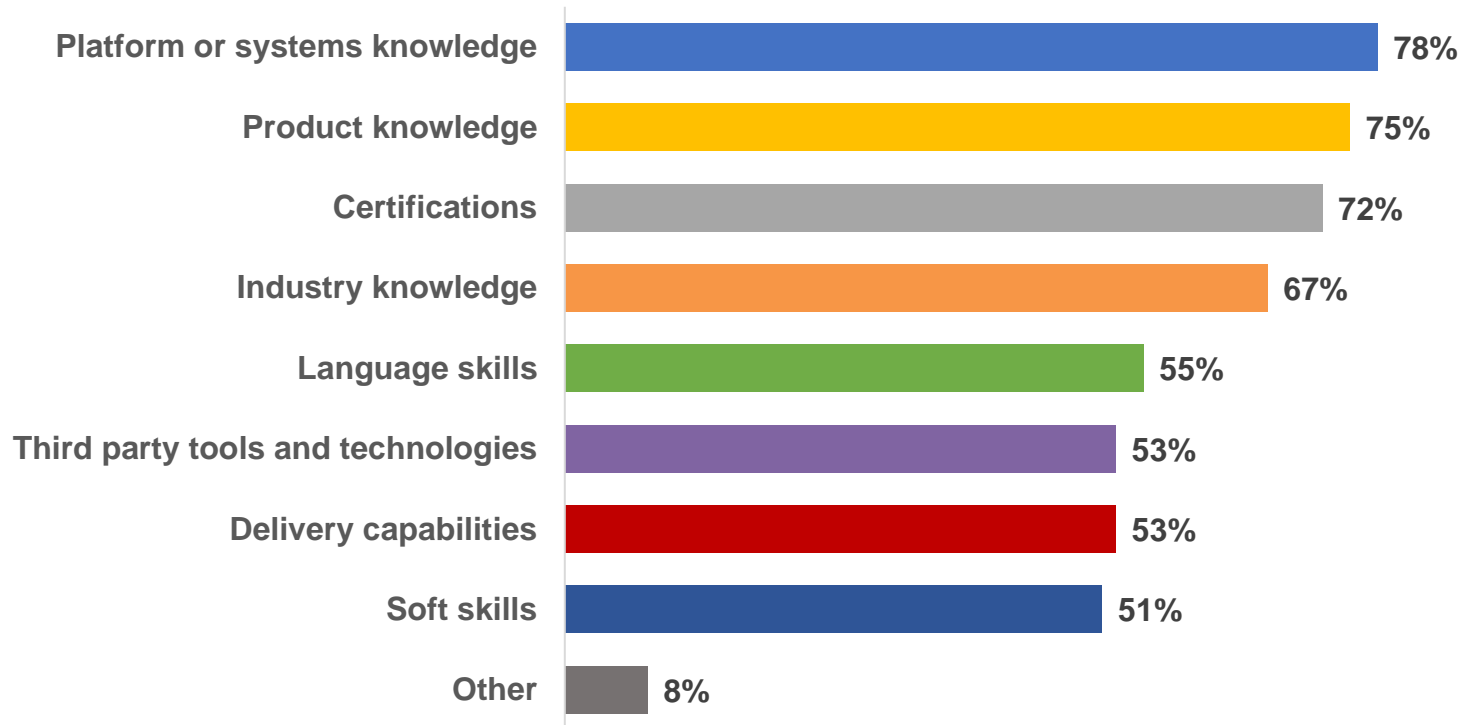
Perhaps one of the most concerning findings of this survey was that 58% did not have skills defined for roles, a 6% increase over the last survey, and an 18% increase since we first asked this question in 2018. The lack of precision in role definition makes it infinitely more difficult to plan for skills development and acquisition.

Q8: How many different skills do you track? – PS/CS, MA, AATA, LF



Similar to role definition, it is also important to find the right balance when it comes to tracking skills. Managing and maintaining too many skills can become too cumbersome, but too few can make it difficult to effectively assign the right resource to the right role. 51% of respondents stated that their organization tracks less than 100 skills. This is a 9% increase since the previous survey, but similar to what was reported when this question was initially asked in 2018.

Q9: What categories of skills do you track? (check all that apply) – PS/CS, MA, AATA, LF

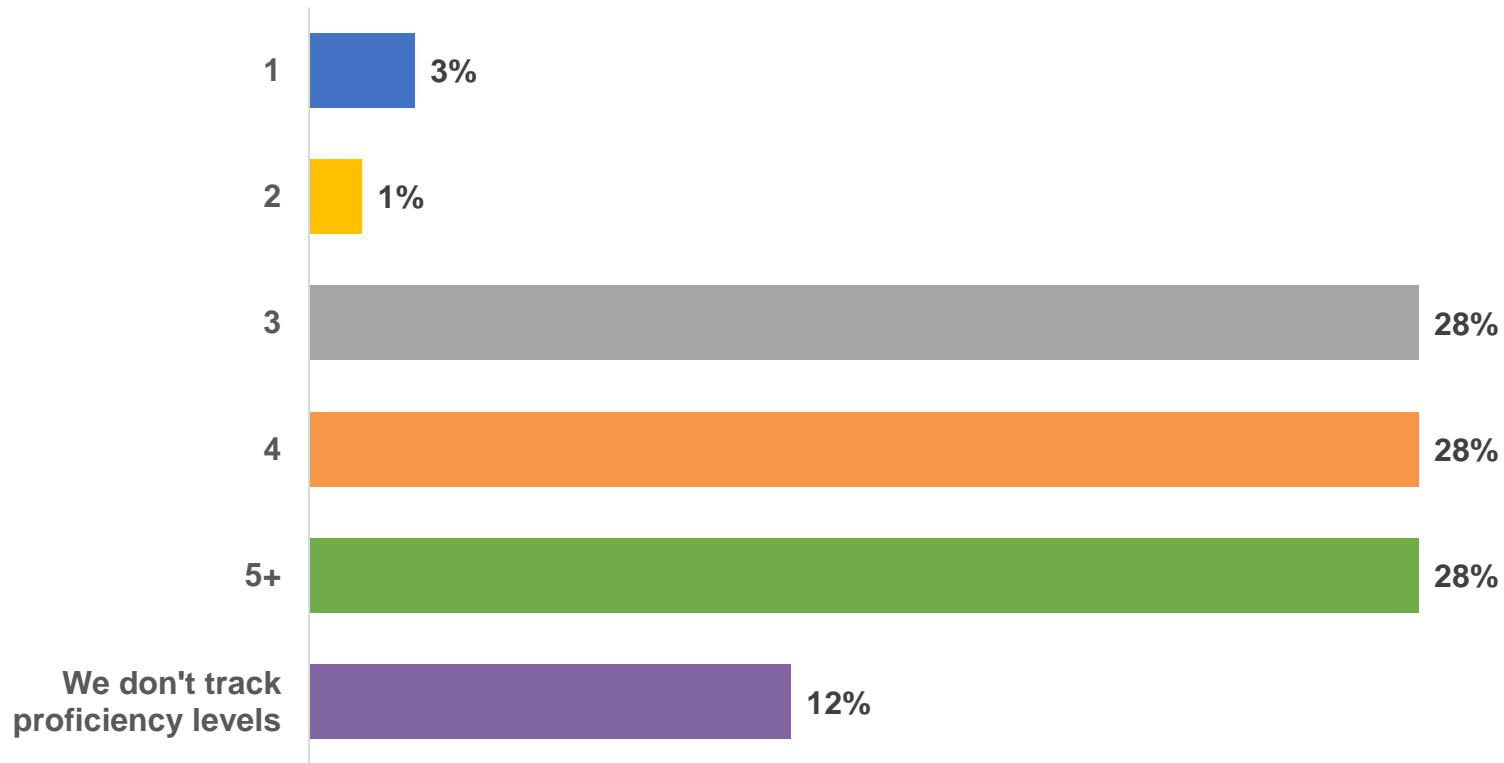


Platform and Product Knowledge, along with Certifications continue to be the primary skills tracked. There is a clear focus on 'hard' skills. For those serving external clients, soft skills, particularly those related to client interactions, are key to improved customer satisfaction, scope creep containment, project management, and more and therefore should receive additional focus.

Other:

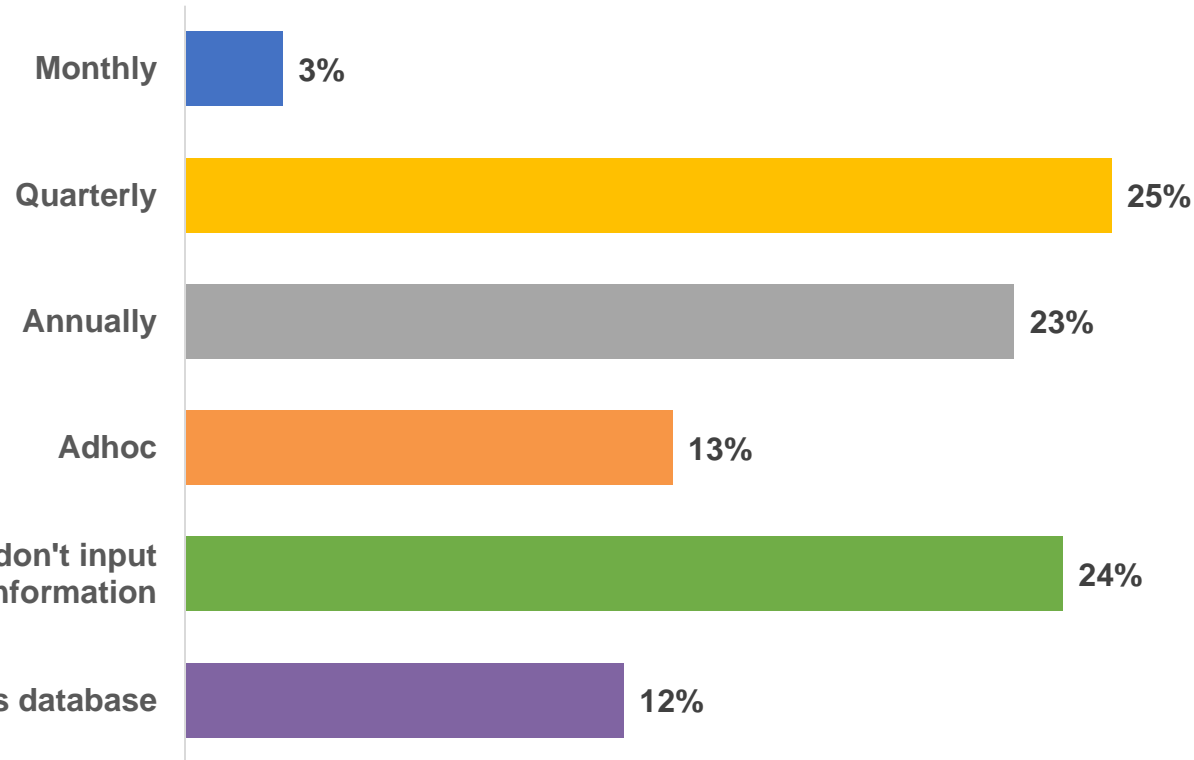
- Software Development Languages
- We don't formally track skills
- Industry preferences
- Interests
- Interest in foreign and domestic assignments / relocation
- We call them 'technical skills'

Q10: How many proficiency levels do you track? – PS/CS, MA, AATA, LF



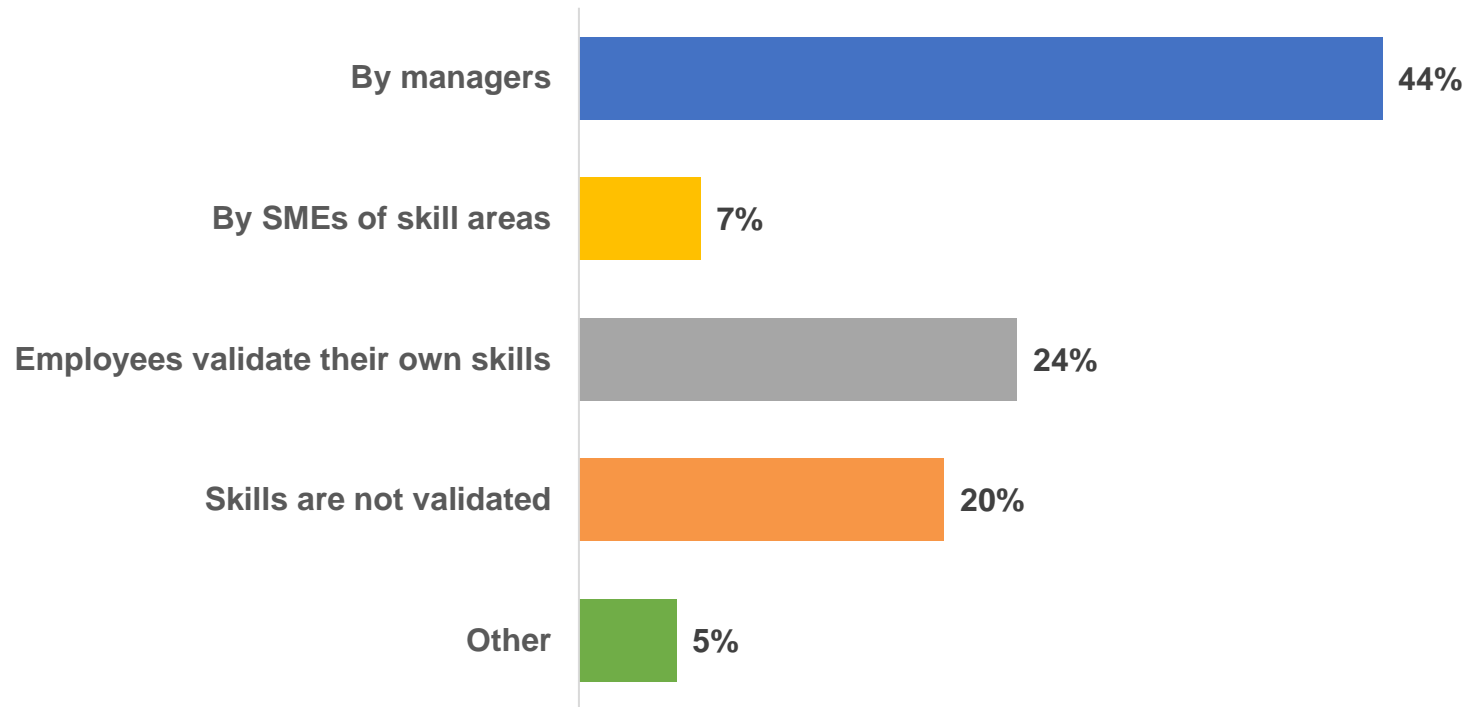
88% of respondents are tracking defined proficiency levels, and most are using a reasonably uncomplicated metric to do so. The data is very similar to the last time we surveyed on this question and continues to be a positive sign.

Q11: How often do employees update their skills in the skills database? (check the answer closest to what you require) – PS/CS, MA, AATA, LF



A key success factor in successful resource management is a well designed and maintained skills database. Skill profiles need to stay up-to-date. With 51% indicating employees are updating their skills annually or more often, it's an encouraging sign that these organizations have a formal process in place; however, this is a slight drop from our last survey.

Q12: How is skills information in the skills database validated? – PS/CS, MA, AATA, LF

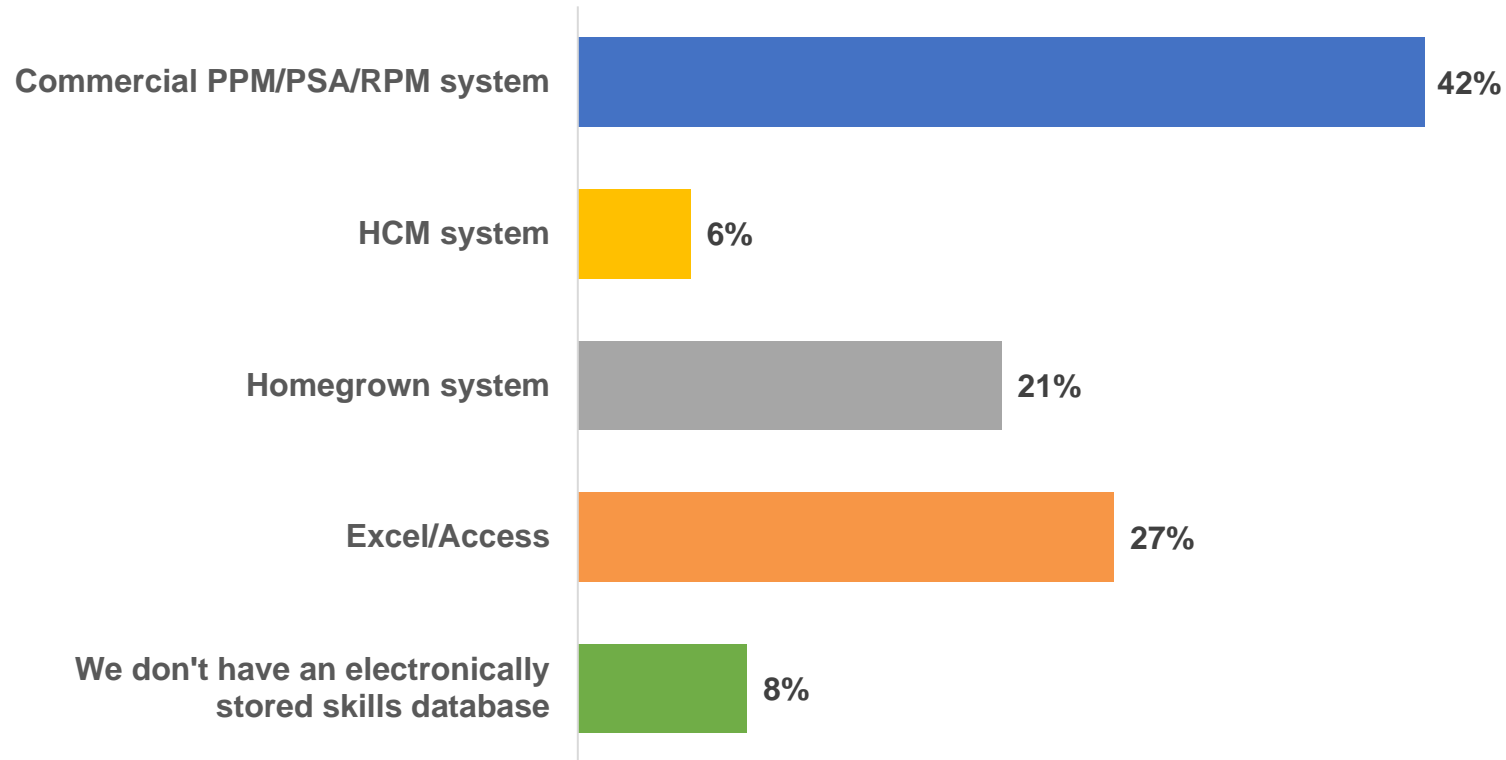


For companies that require regular maintenance of skills information, most have a validation procedure to ensure integrity of the data. Note that 44% (+7%) default to either no validation or allow the employee to self-validate. The RMI recommends that a manager or SME conduct validation somewhere in the process.

Other:

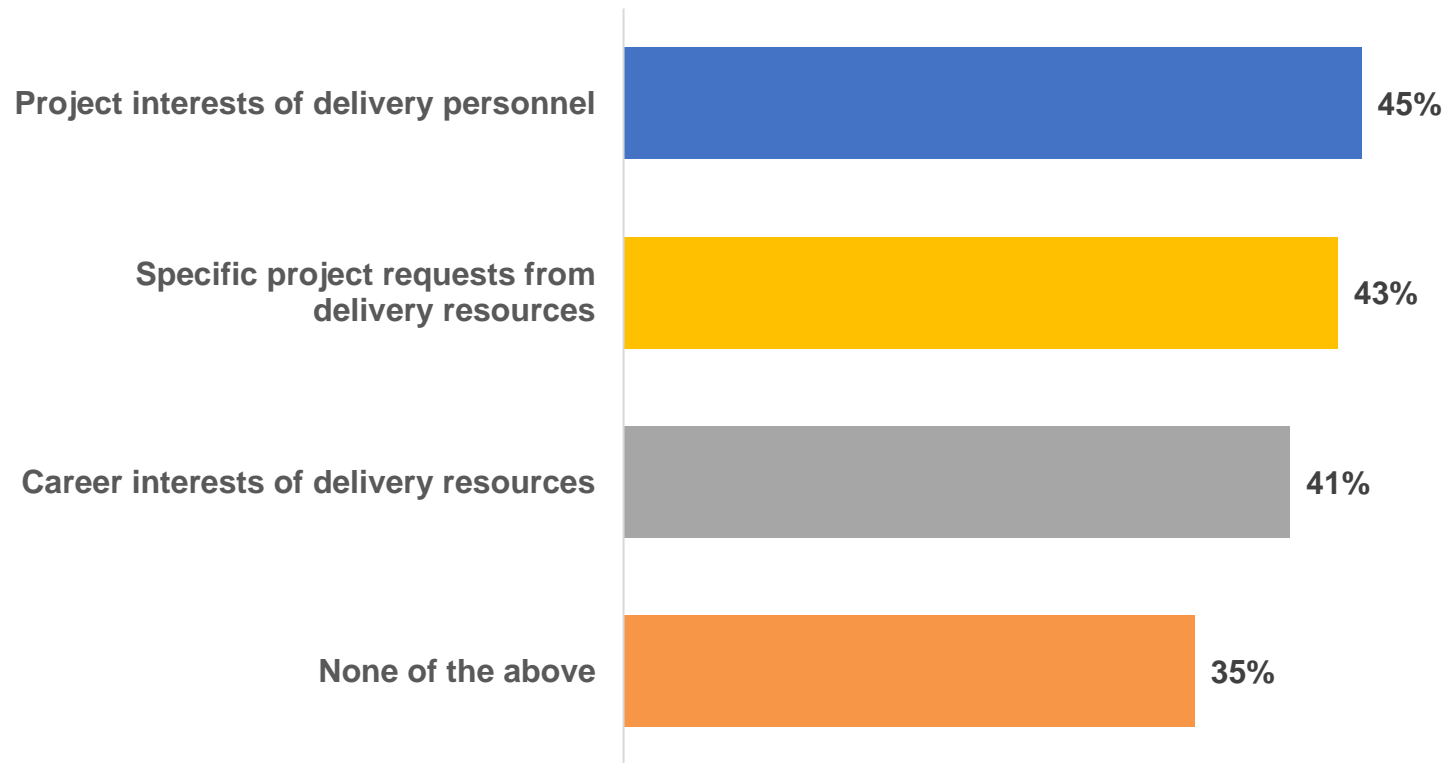
- Employees enter, but it is reviewed with the employee at least semi-annually during performance review sessions
- Regulated skills are validated, non-regulated are not
- By RMs, Coaches, and Service Line Leaders
- Regulatory exp is validated, other exp and skills is not

Q13: How do you physically store your skills database? (check all that apply) – PS/CS, MA, AATA, LF



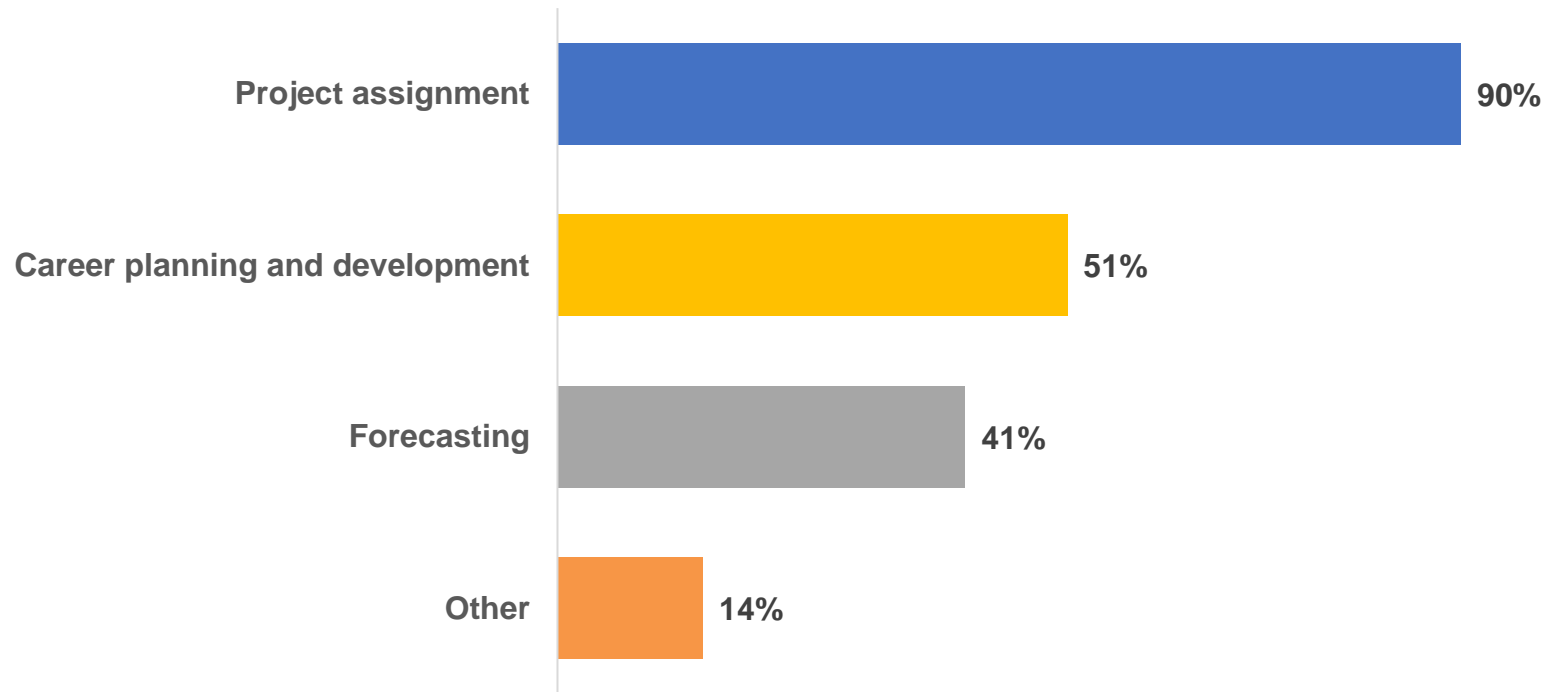
92% of respondents are using some form of technology to store skills data. Commercial PPM/PSA/RPM systems continue to be the most used method for storing skills. We continue to see an overreliance on Excel/Access, which is consistent with our previous surveys.

Q14: As input to your resource management planning, which of the following do you track? (check all that apply) – PS/CS, MA, AATA, LF



It is encouraging that companies continue to track elements important to the individual to support scalable employee engagement programs. However, there are still opportunities for improvement with more than one-third not tracking these elements.

Q15: What do you use skills data for? (check all that apply) – PS/CS, MA, AATA, LF

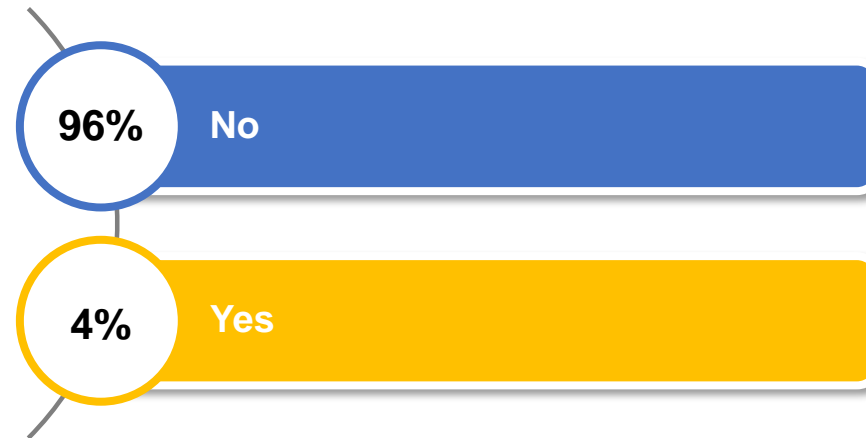
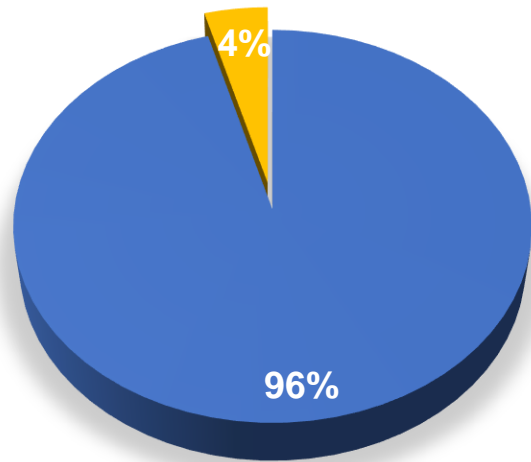


Improving resource management will require companies to put skills data to work more universally for forecasting and career planning and development efforts, and not solely focusing on project allocation needs. Results on this question vs. our last survey were roughly in line.

Other:

- Periodic project assignment when need to go outside of business unit
- To track licensure
- Analysis of rare skills, highly demanded skills, etc.
- Not using skills data
- Workforce Planning
- Marketing materials - demographics summaries
- We don't use them yet but anticipate using them for all the above.
- Hiring
- Clearance tracking (restricted access)

Q16: Are there any regulatory issues (governmental) or other important considerations (e.g. labor groups or unions) preventing or limiting your organization from deploying a skills inventory? – PS/CS, MA, AATA, LF

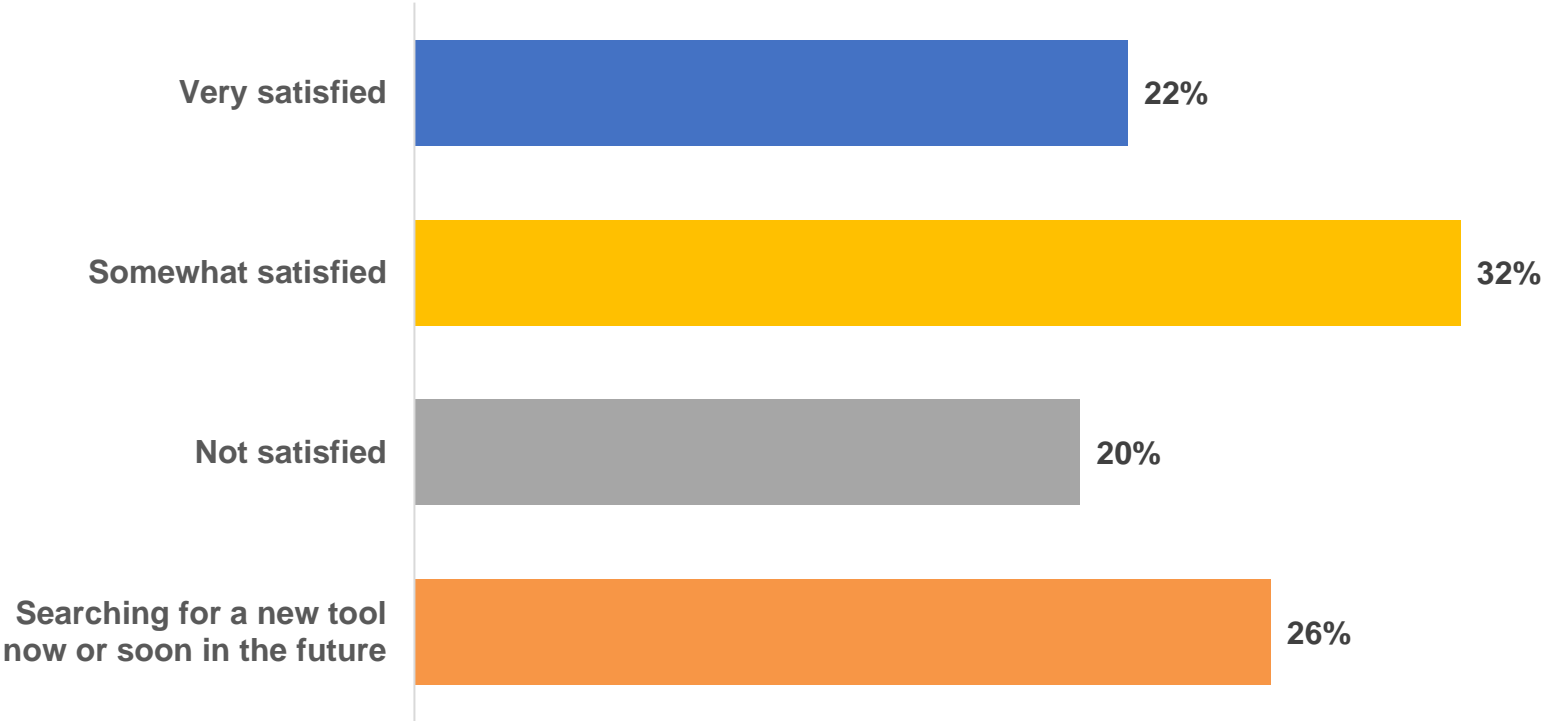


The overwhelming majority say that there are no regulatory issues preventing or limiting their organization from deploying a skills inventory.

Reasons preventing the deployment of a skills inventory:

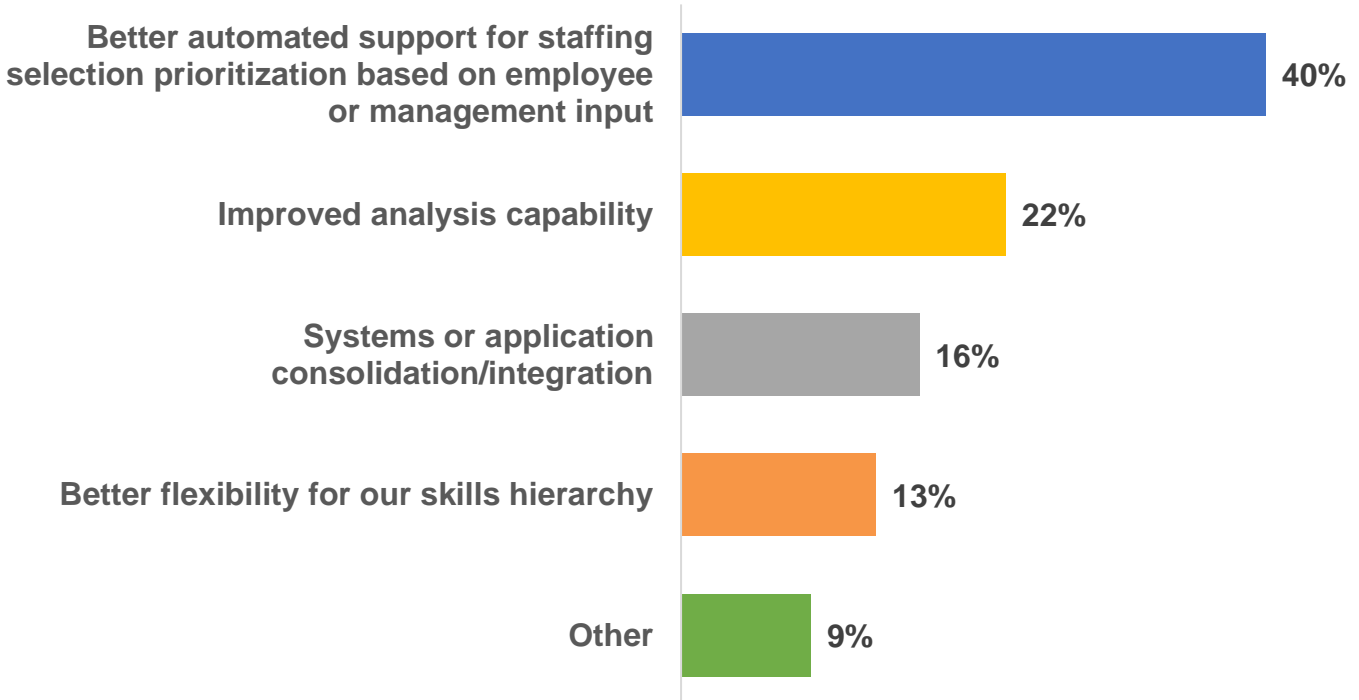
- Need to figure out certain governmental requirements and how to capture them in our skills inventory
- Our prior poor implementation inadvertently allowed some employees to over-state their expertise and push for raises.
- Our Germany folks are not allowed to rate their skills. German Works Council prohibits it. We are working a way to segregate the GE Resources so we can rate the other countries

Q17: We are satisfied with our PSA/PPM/RPM tool(s) regarding capabilities for skills tracking and management? – PS/CS, MA, AATA, LF



While 54% of respondents are somewhat to very satisfied with the capabilities for skills tracking and management in their automation tool(s), the rest are not. These findings are very similar to our last survey, and indicative of continuing opportunities for PSA/PPM providers to improve capabilities for tracking and managing skills.

Q18: Our highest priority for PSA/PPM/RPM improvements related to skills management and tracking is: – PS/CS, MA, AATA, LF



Automated staffing support and improved business analysis capabilities accounted for the majority of identified needs for PSA/PPM application enhancements.

We highlighted in 2020 that system consolidation was being talked about more with the growing overlap of data between PSA/PPM systems and HR systems such as HCM tools, and it did increase 7% since the last survey.

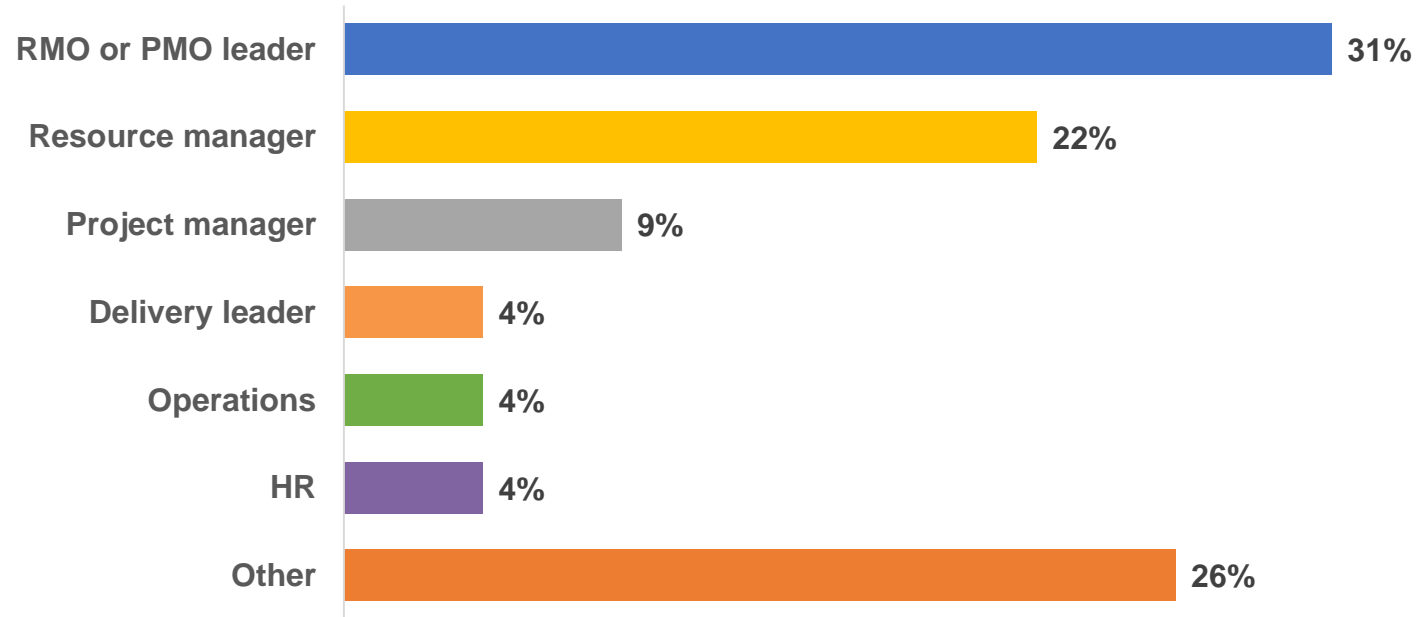
Other:

- All the above plus more intuitive.
- Streamline and focus list of skills being tracked
- Unsure; tool is just recently implemented
- Automation required based on time-recording
- We haven't deployed skills tracking even though it is present
- None

SERVICES TEAMS SERVING INTERNAL CLIENTS

Enterprise/IT (E/IT)
Product Development (PD)

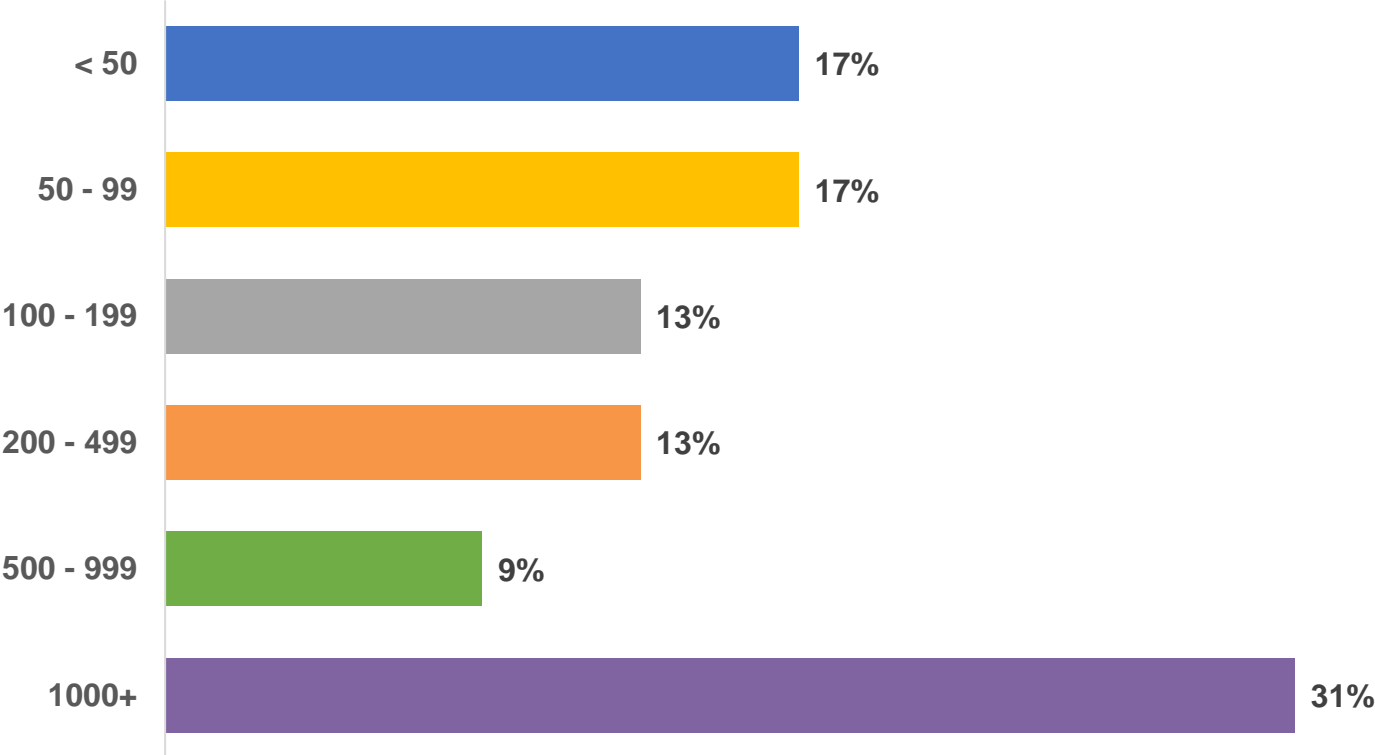
Q2: Which option best describes your role? – E/IT, PD



New to the survey this year, respondents were asked to provide information on their role; 53% stated they are either Resource Managers or RMO/PMO leaders within their organization.

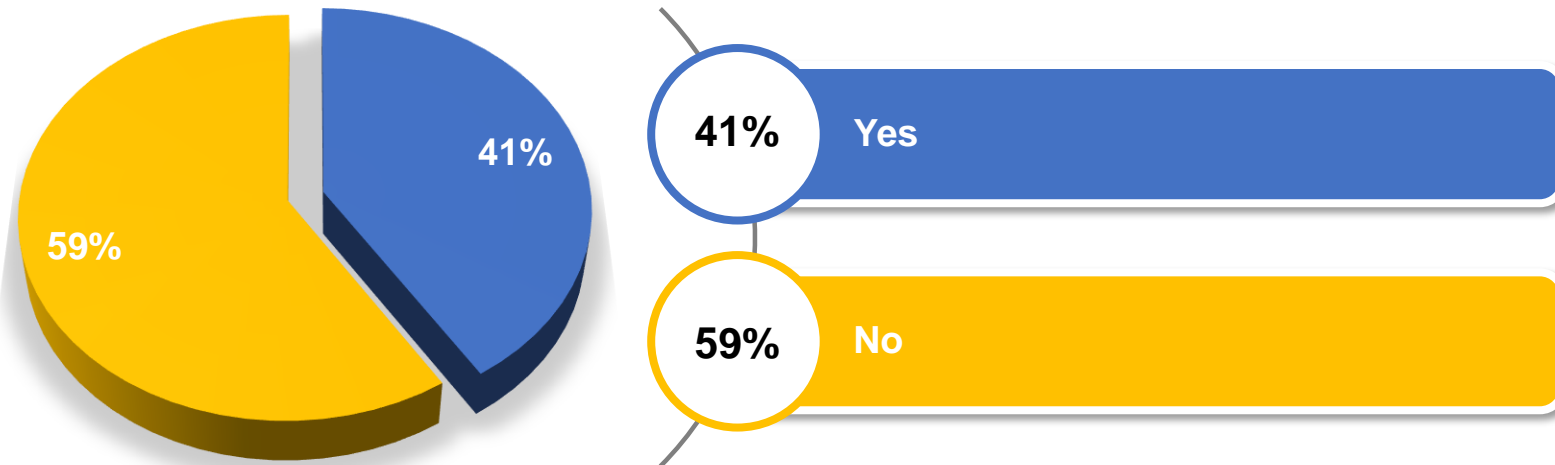
- Other:
- Services Director
 - Business Analyst / Resource Planner
 - Researcher
 - Executive
 - Sales

Q3: How many resources in total does your organization manage collectively with all resource managers? – E/IT, PD



We had a good cross-section of different size organizations responding to the survey.

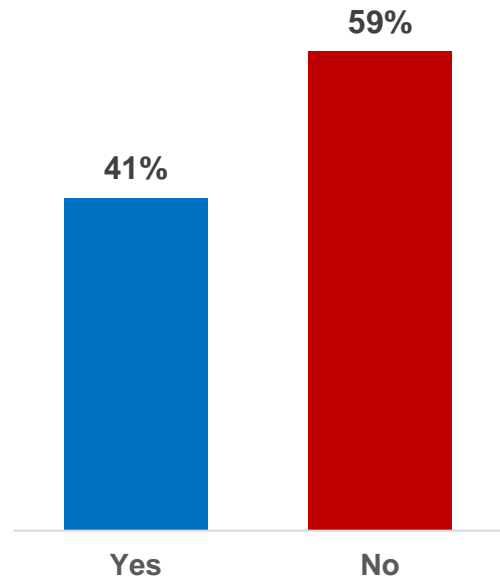
Q4: Does your current skills database effectively support your business needs? – E/IT, PD



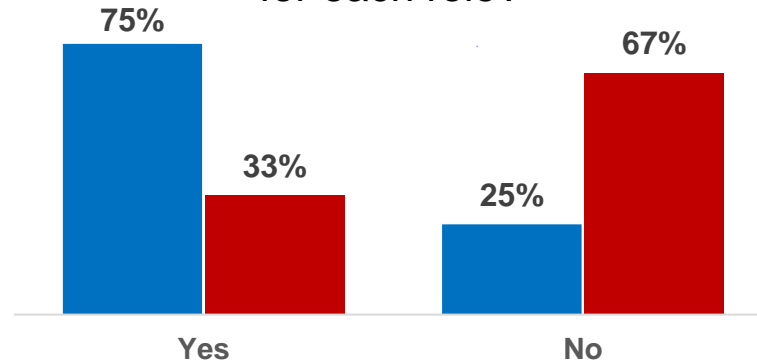
Similar to the last time we surveyed on this question, a majority of the companies responding indicated the skills database capabilities in their organizations was a pain point. Since an effective skills database is essential to planning allocation of human resources, addressing this shortfall should be a high priority for these companies.

Analysis (E/IT, PD): The leaders in creating and using an effective skills data base do the following:

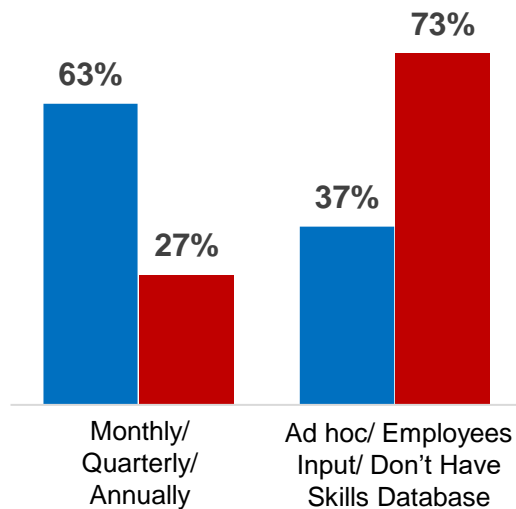
Does your current skills database effectively support your business needs?



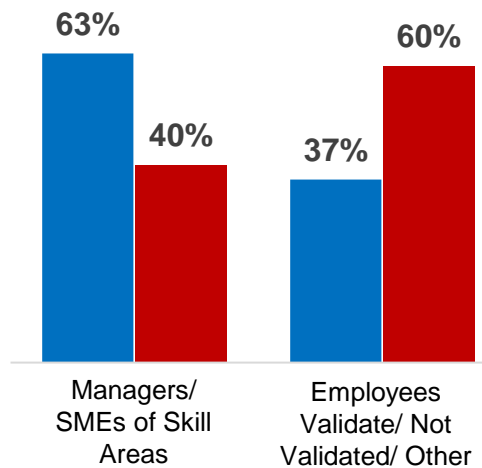
Do you have skills defined for each role?



How often do employees update their skills in the skills database?



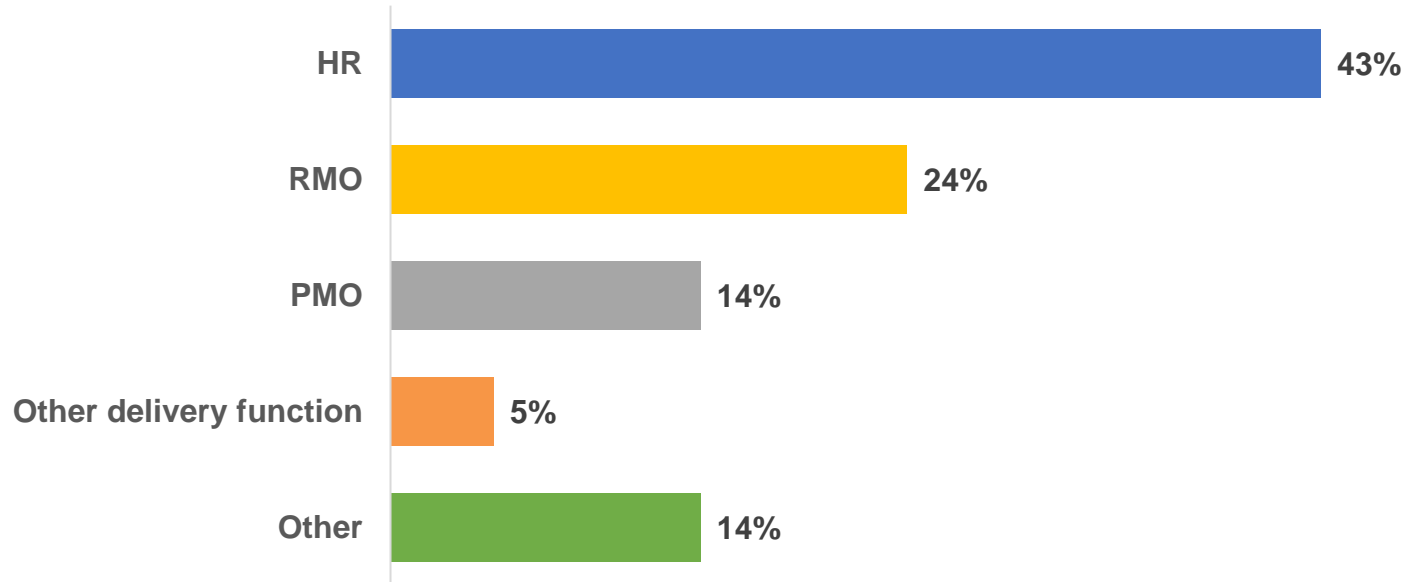
How is skills information in the skills database validated?



Three RMI recommended practices for building and maintaining an effective skills database were confirmed with this survey data:

- 1) Defining skills by role
- 2) Regular skills updates by employees
- 3) Processes in place to ensure proper validation of employee skills data by management or SMEs

Q5: Who owns the skills database in your organization? – E/IT, PD

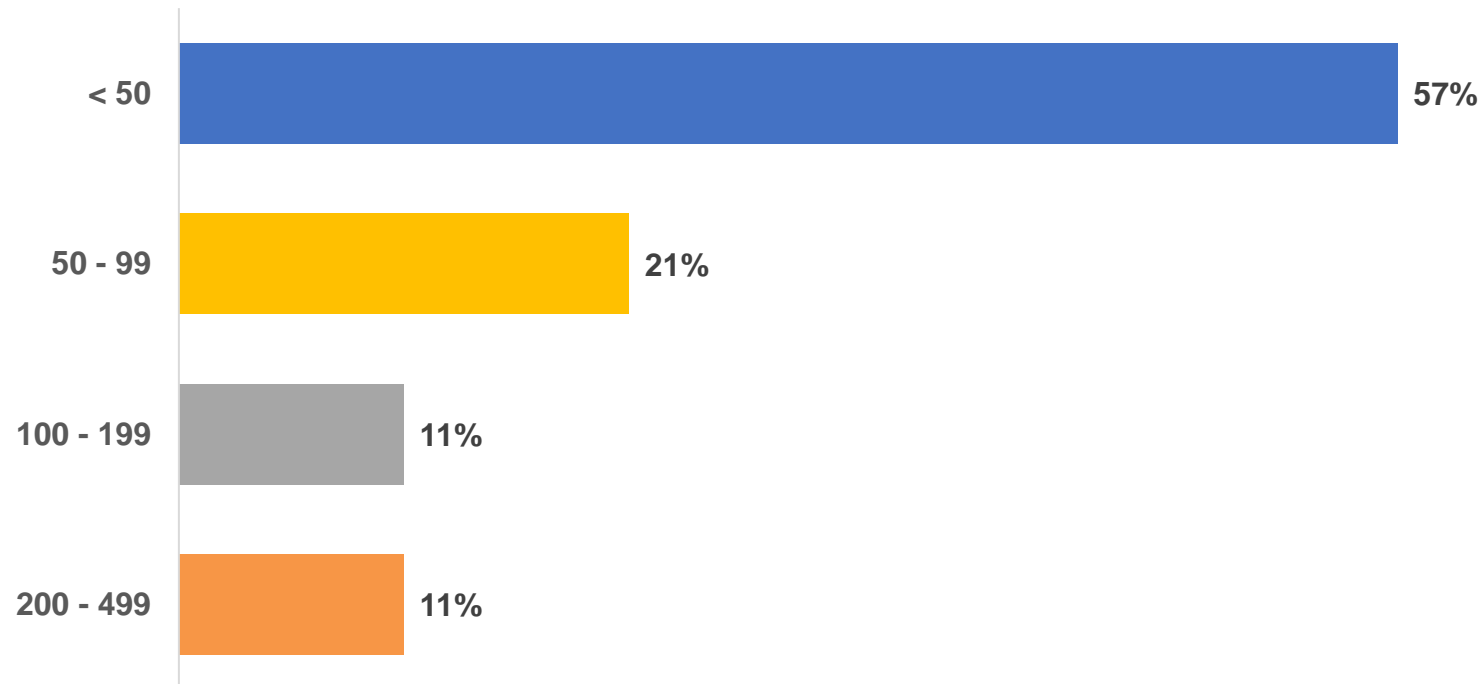


For those in E/IT and PD, HR is the ownership point of choice most selected, climbing 21% since our last survey. The industry continues to evolve on ownership of the skills database. The RMI believes the RMO will grow in influence for this important resource management process building block.

Other:

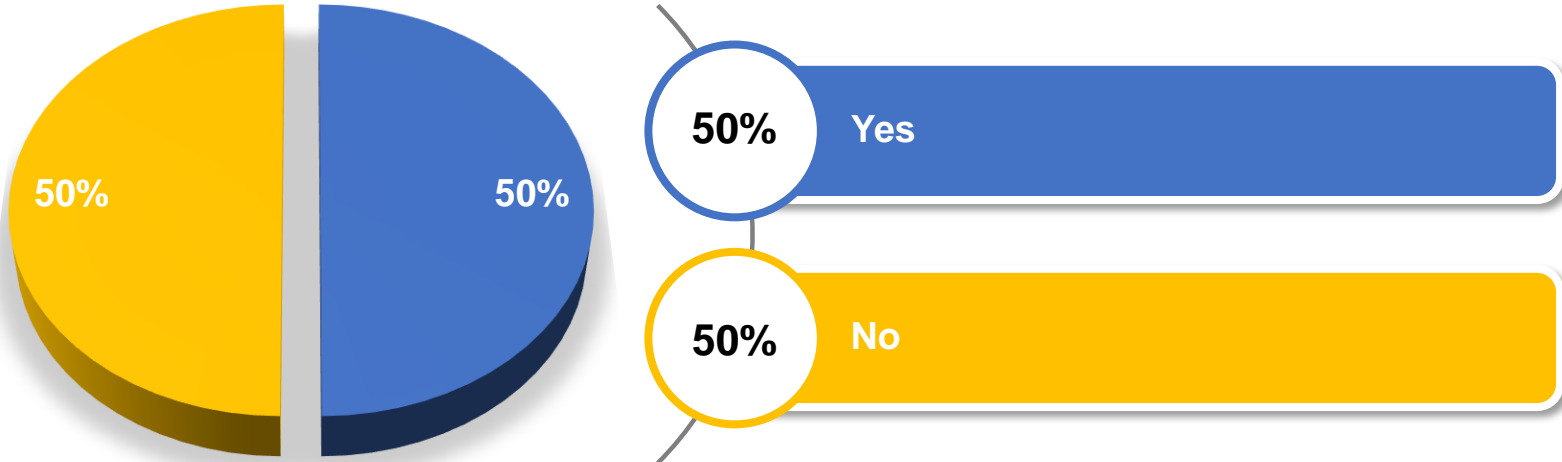
- We don't have one
- Does not exist
- We don't currently have a skills database

Q6: How many roles do you define in your delivery organization? – E/IT, PD



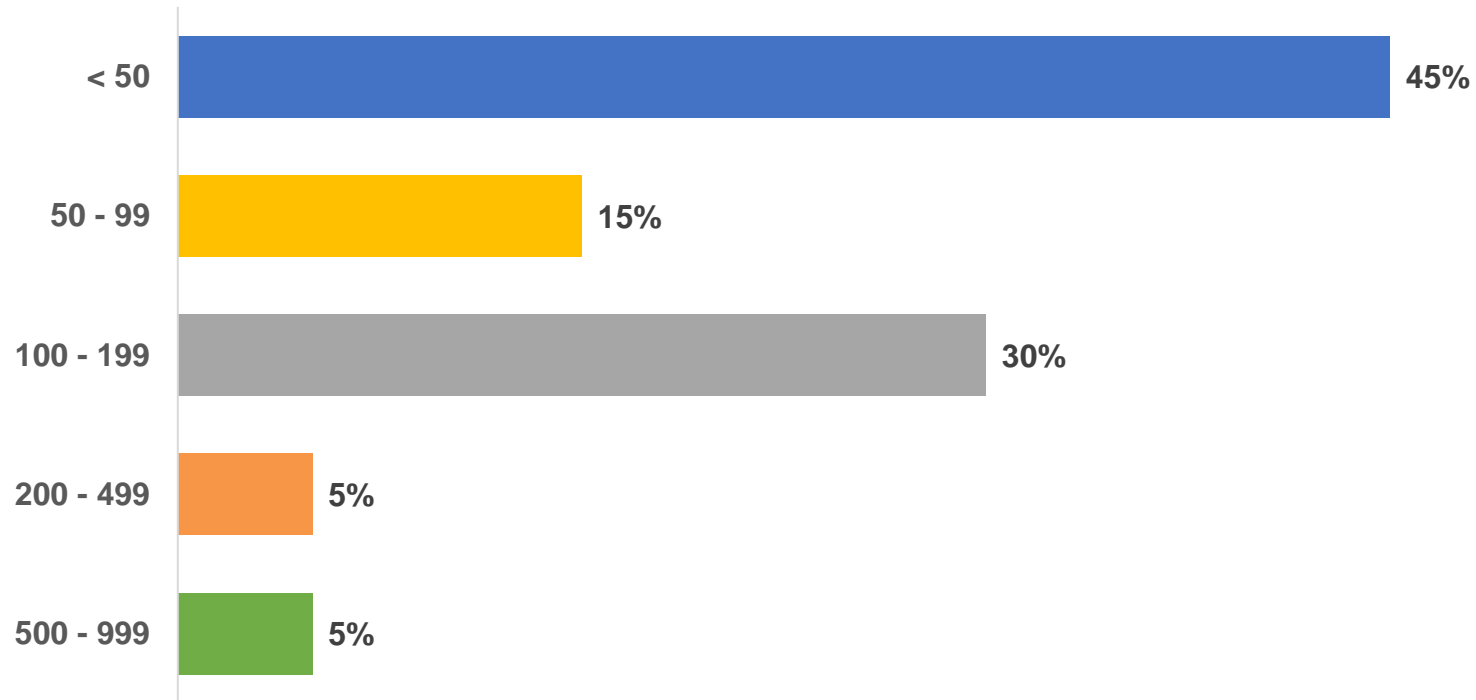
Role definition is an important aspect of characterizing resource supply. The process of defining roles and skills is as much an art as a science. The key is to have enough granularity to enable planning while ensuring they do not become too cumbersome to effectively manage and maintain. Compared to the last time we surveyed this group, the <50 response grew by 9%, and it has grown 16% since 2018.

Q7: Do you have skills defined for each role? – E/IT, PD



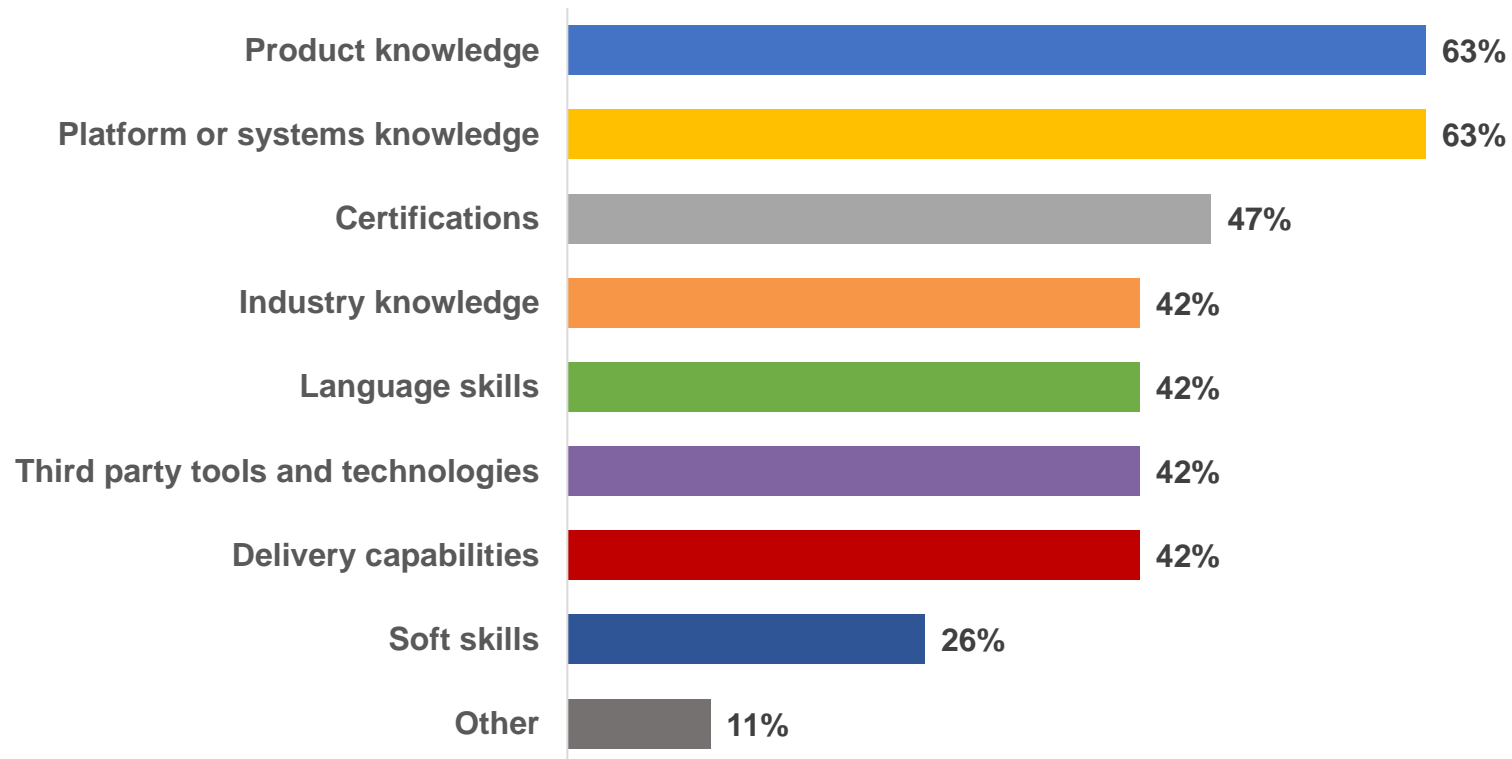
While it is concerning that half of respondents do not have skills defined for roles - the lack of precision in role definition makes it infinitely more difficult to plan for skills development and acquisition - it should be noted that there has been considerable improvement since our previous survey (+19%).

Q8: How many different skills do you track? – E/IT, PD



It is also important to find the right balance when it comes to tracking skills. Managing and maintaining too many skills can become too cumbersome, but too few can make it difficult to effectively assign resources. 60% in this group state that their organization tracks less than 100 skills (+8%).

Q9: What categories of skills do you track? (check all that apply) – E/IT, PD

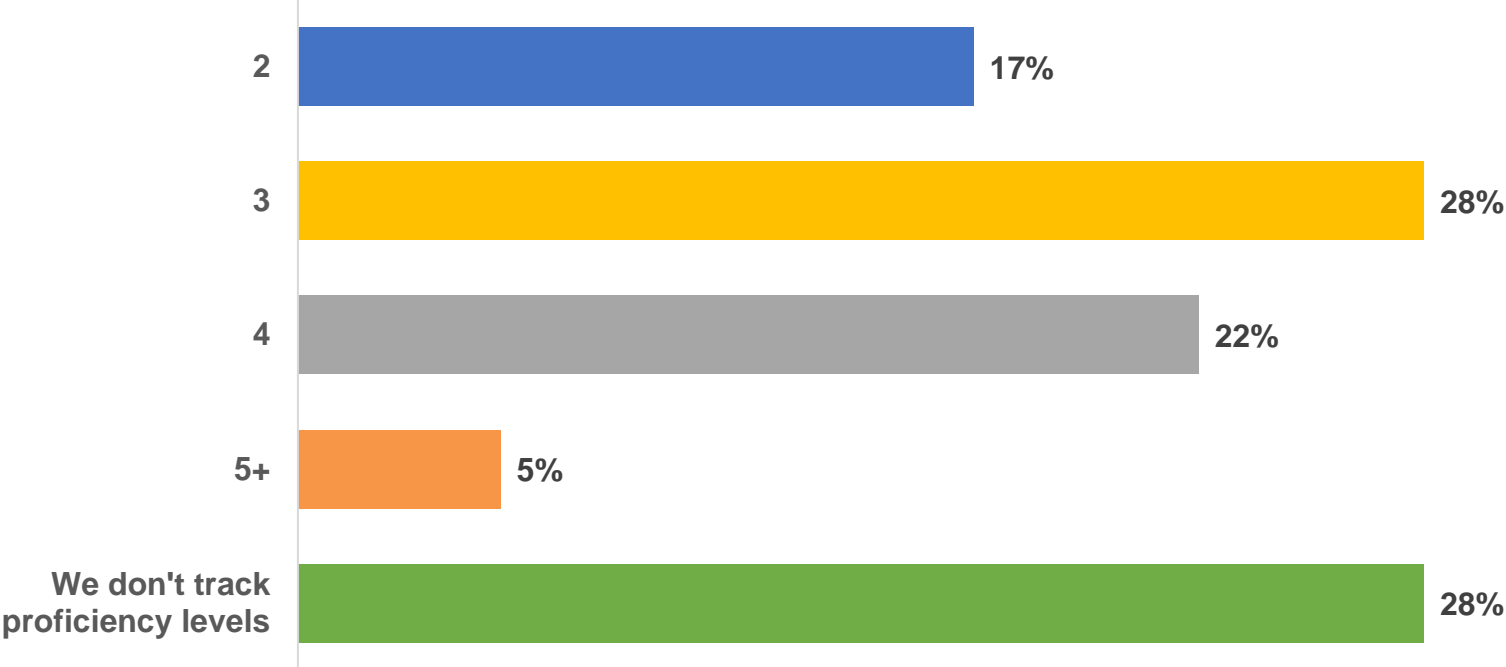


Product and Platform Knowledge, along with Certifications continue to be the primary skills tracked. There is a clear focus on 'hard' skills. Soft skills, particularly those related to internal client interactions are helpful for managing project expectations and outcomes. Therefore, E/IT and PD orgs should consider giving soft skills additional focus.

Other:

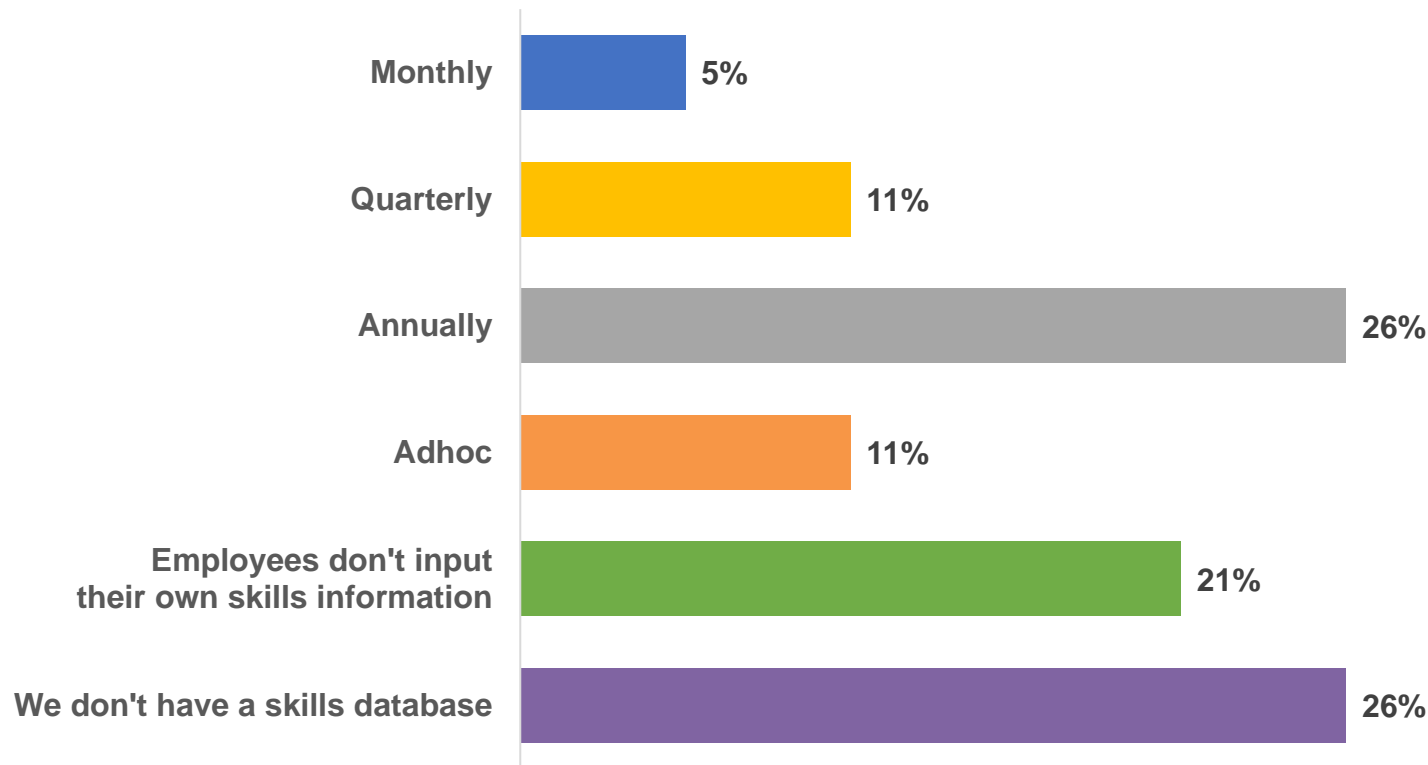
- Just returning to skills tracking
- None

Q10: How many proficiency levels do you track? – E/IT, PD



While there has been more of a focus on tracking proficiency levels since our previous survey, 28% are not utilizing them – a clear contrast exists with this group vs. their external serving counterparts.

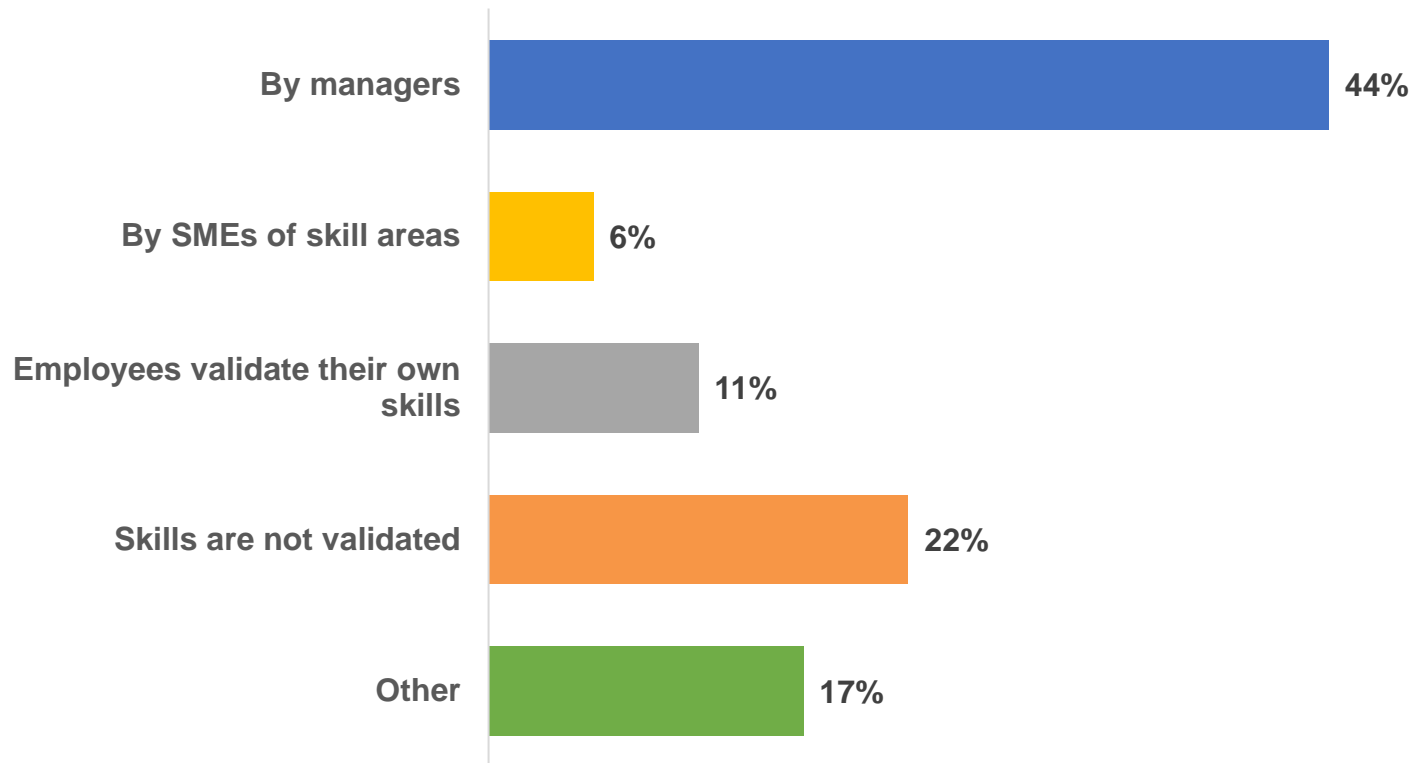
Q11: How often do employees update their skills in the skills database? (check the answer closest to what you require) – E/IT, PD



A key success factor in successful resource management is a well designed and maintained skills database. Skill profiles need to stay up-to-date. While only 42% indicate their employees are updating their skills annually or more often, it's an encouraging sign compared to our previous survey (23%).

Still, the data clearly points to an industry with significant room for improvement regarding skills databases supporting resource management.

Q12: How is skills information in the skills database validated? – E/IT, PD

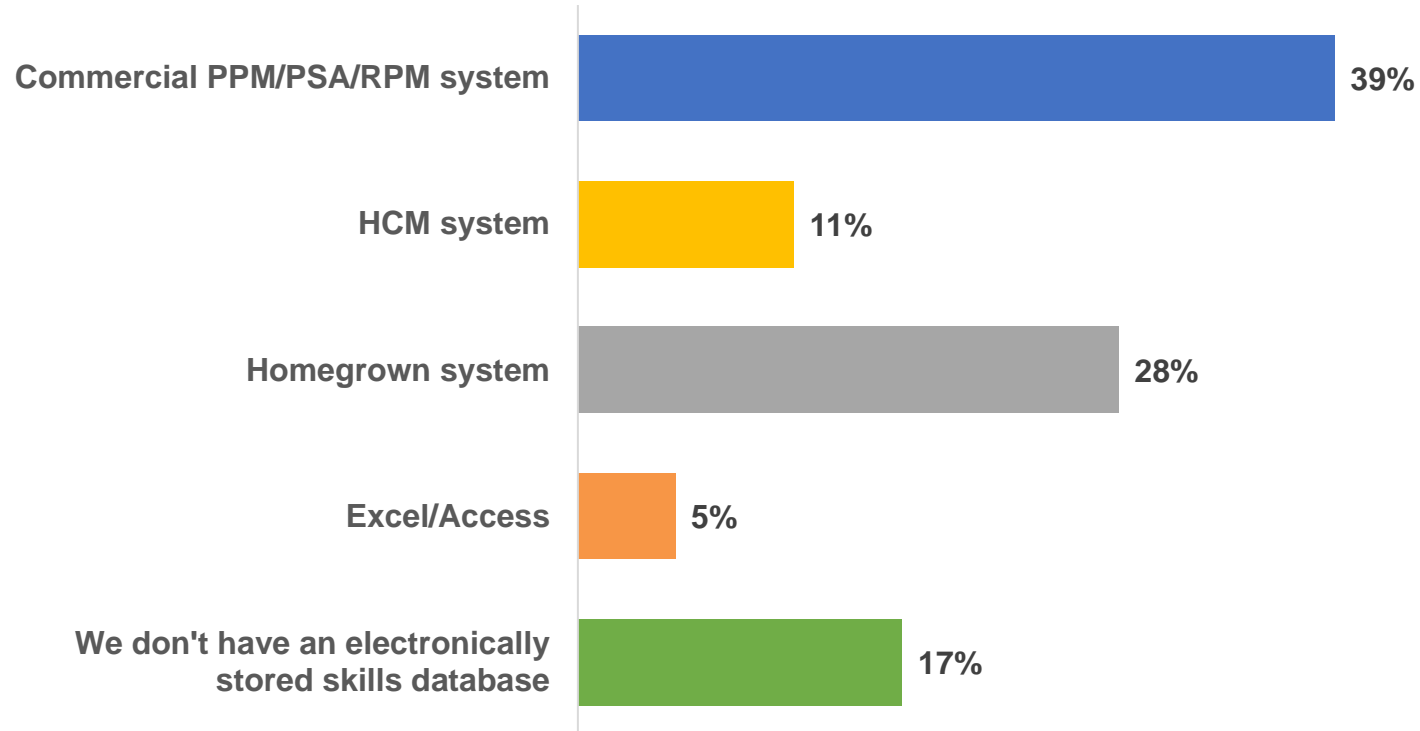


For companies that require regular maintenance of skills information, most have a validation procedure to ensure integrity of the data. Note that one-third of respondents default to either no validation or allow the employee to self-validate. While there is room for improvement, there has been a sizeable decline in these categories since our previous survey. The RMI continues to recommend that a manager or SME conduct validation somewhere in the process.

Other:

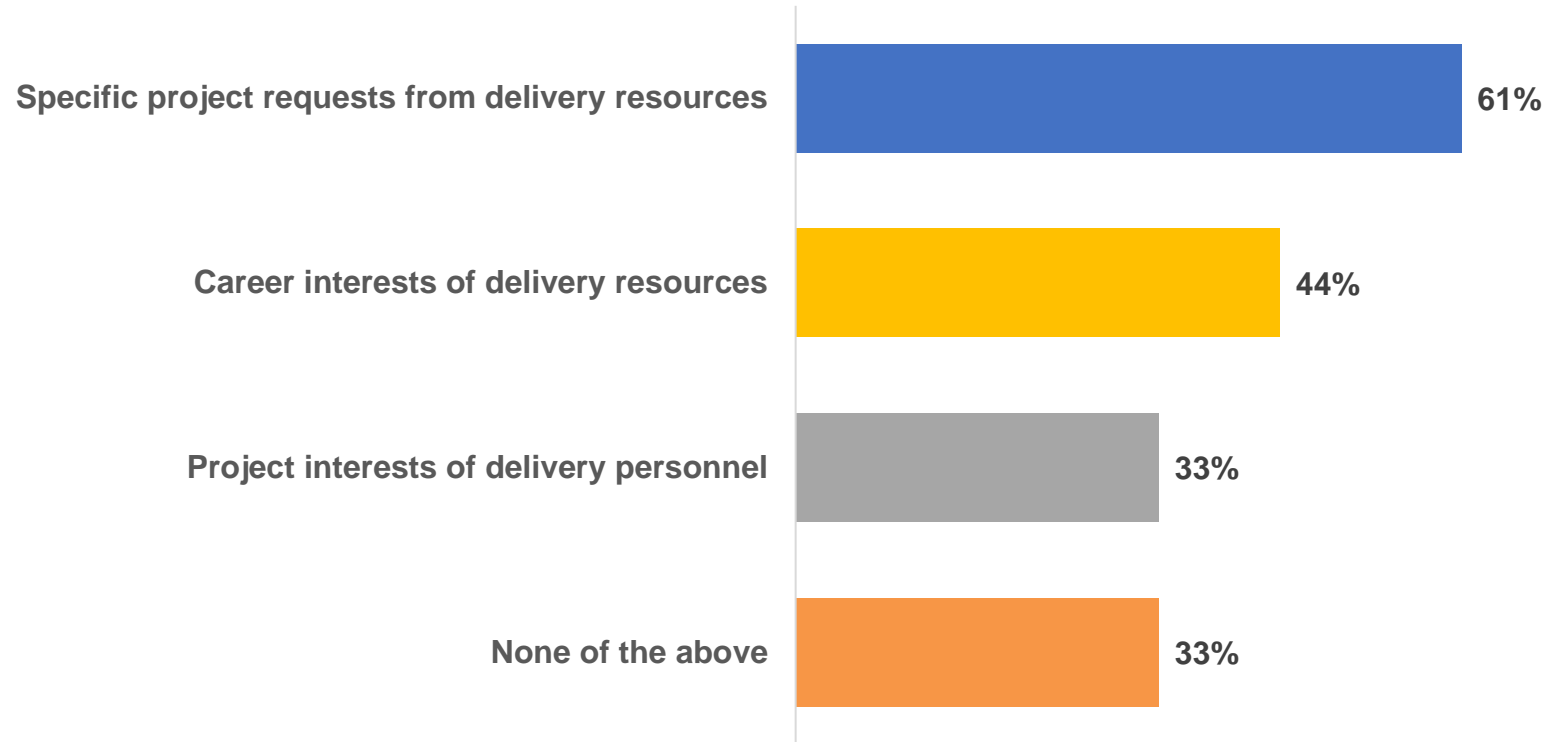
- I don't know of any skills data base validation efforts
- Roles (not skills) are validated by functional managers
- Depends on the skill and skill level

Q13: How do you physically store your skills database? (check all that apply) – E/IT, PD



More than three-fourths of respondents are using some kind of technology, either commercial, HCM, or homegrown, to store skills data, a 30% increase over our previous survey. Simultaneously, there has been a 19% reduction in the use of spreadsheets to support the process, which is a welcomed evolution.

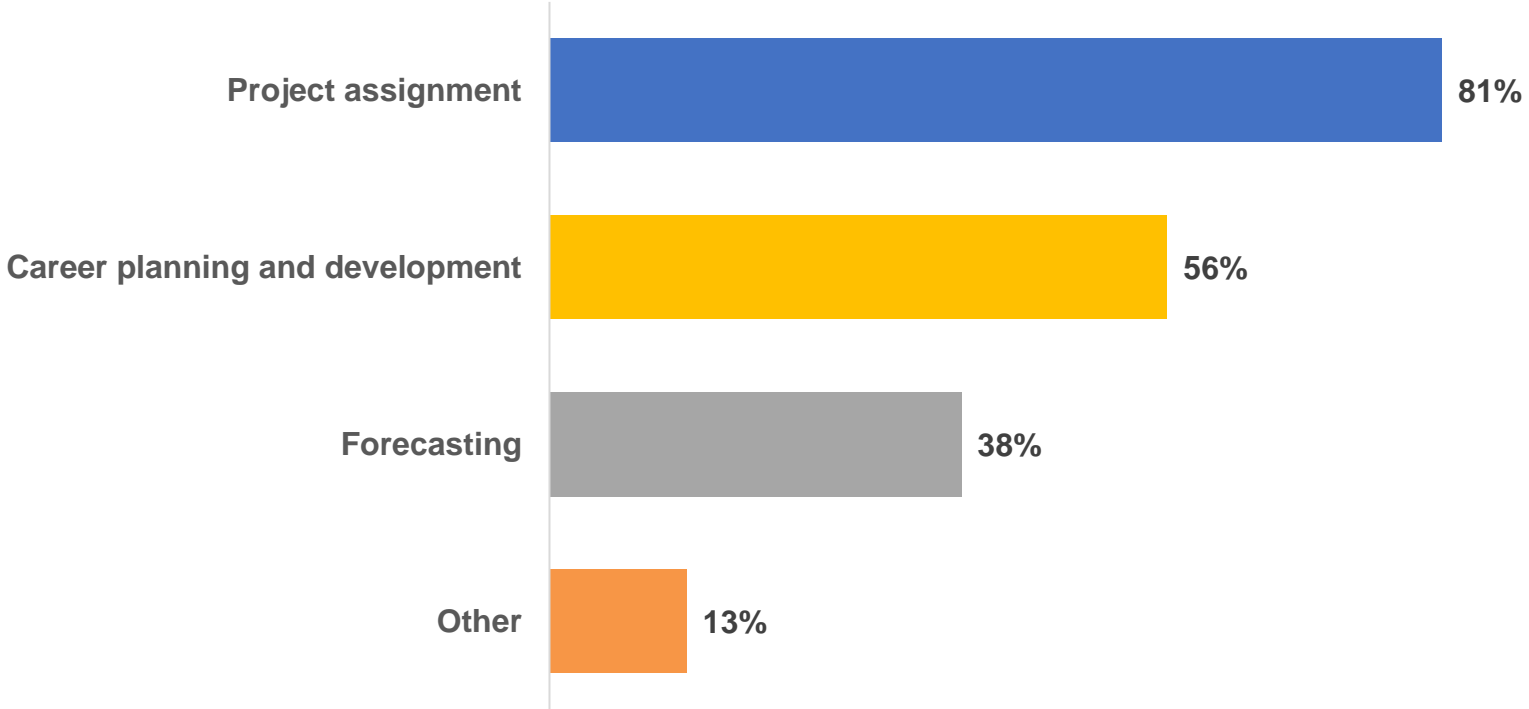
Q14: As input to your resource management planning, which of the following do you track? (check all that apply) – E/IT, PD



It is encouraging to see so many companies are tracking elements important to the individual to support scalable employee engagement programs.

While there is still room for improvement, the 33% of companies not tracking these elements is a big drop from 52% in 2020.

Q15: What do you use skills data for? (check all that apply) – E/IT, PD

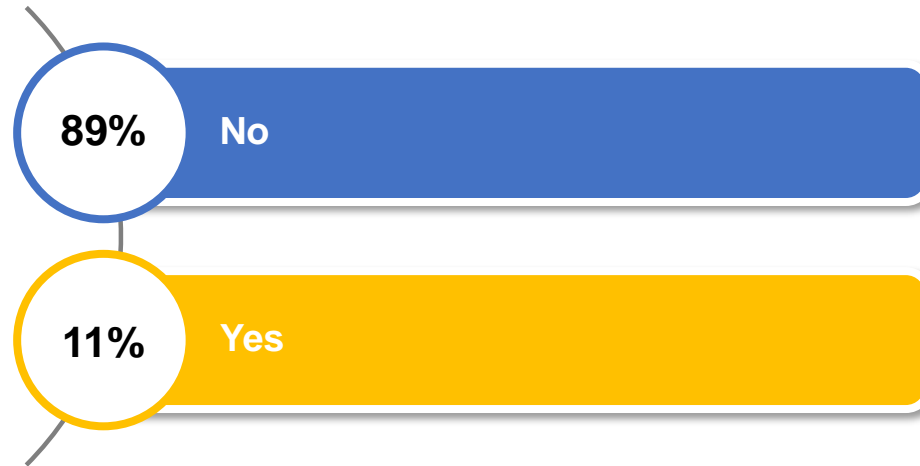
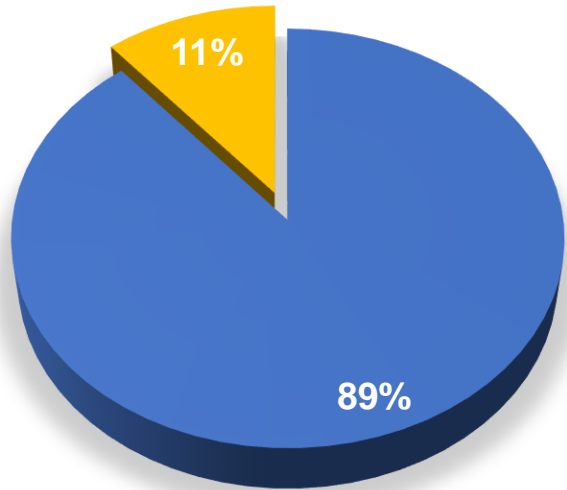


Improving resource management will require companies to put skills data to work more universally for forecasting and career planning and skills development efforts, and not solely focusing on project allocation needs. Results on project assignment are in line with our last survey; however, forecasting saw a 30% drop as career planning and development received more focus (+14%).

Other:

- Periodic project assignment when need to go outside of business unit
- To track licensure
- Analysis of rare skills, highly demanded skills, etc.
- Not using skills data
- Workforce Planning
- Marketing materials - demographics summaries
- We don't use them yet but anticipate using them for all the above.
- Hiring
- Clearance tracking (restricted access)

Q16: Are there any regulatory issues (governmental) or other important considerations (e.g. labor groups or unions) preventing or limiting your organization from deploying a skills inventory? – E/IT, PD

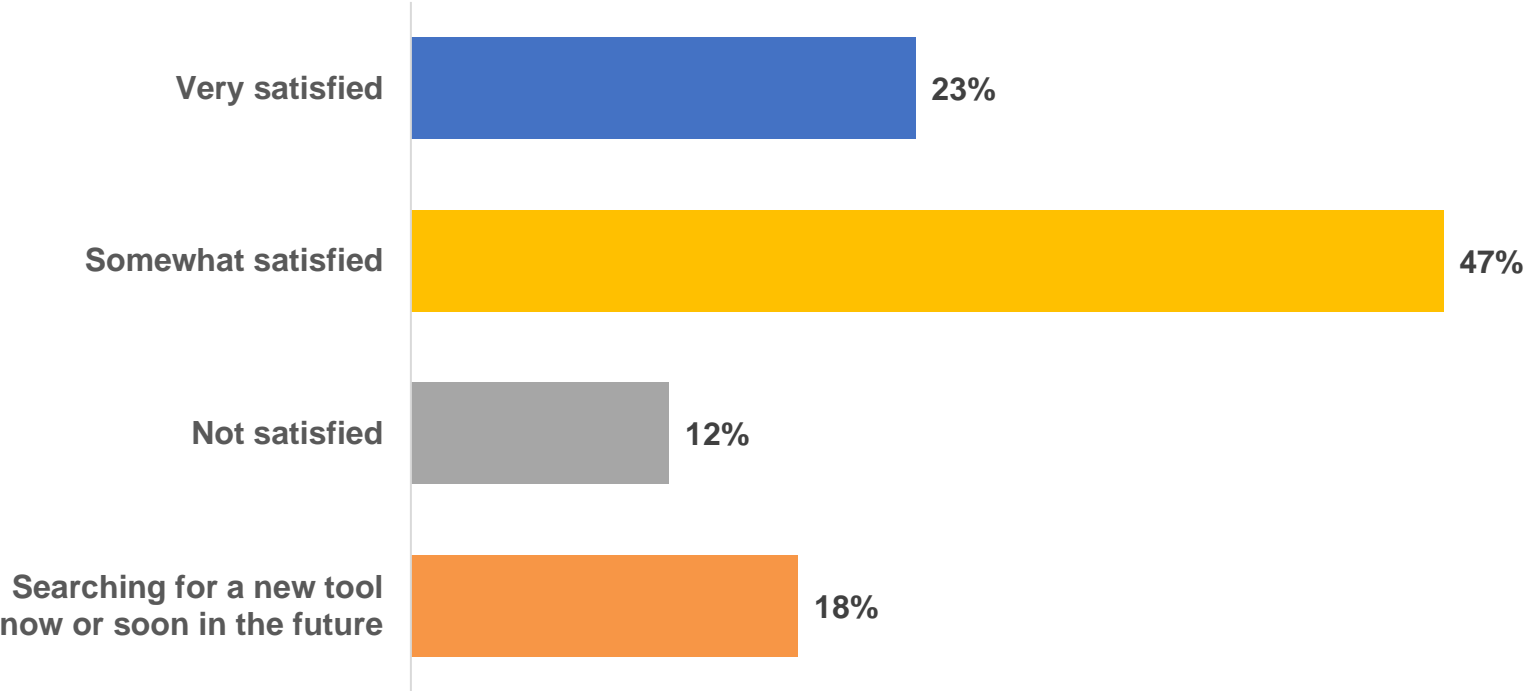


The overwhelming majority say that there are no regulatory issues preventing or limiting their organization from deploying a skills inventory. Those that do feel this indicated that HR or overlap with HR is the cause.

Reasons preventing the deployment of a skills inventory:

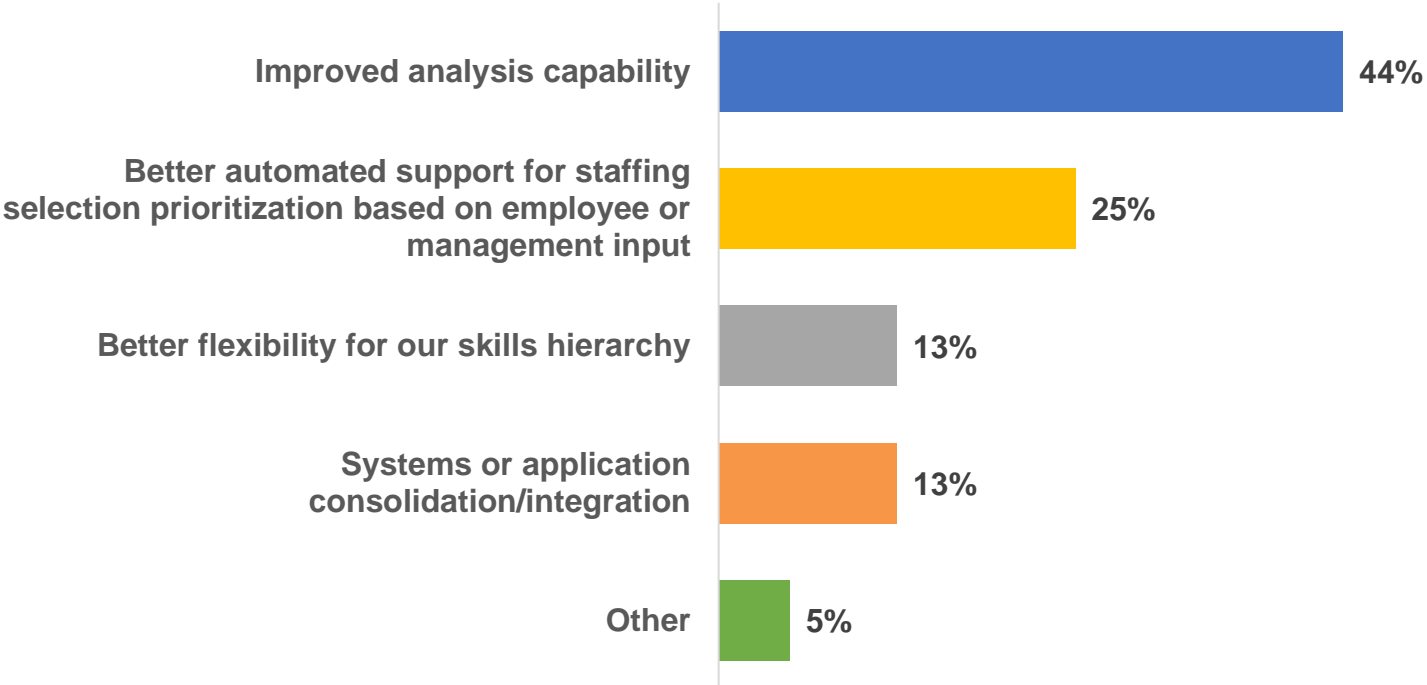
- Overlap with HR function
- HR is limiting our ability to track soft skills

Q17: We are satisfied with our PSA/PPM/RPM tool(s) regarding capabilities for skills tracking and management? – E/IT, PD



On a positive note, 70% of respondents are somewhat to very satisfied with the capabilities for skills tracking and management in their automation tool(s). This represents a 25% improvement since our last survey. Still, 30% are either not satisfied or searching for a new tool. This area continues to be an opportunity for PSA/PPM providers to improve their capabilities.

Q18: Our highest priority for PSA/PPM/RPM improvements related to skills management and tracking is: – E/IT, PD



Improved business analysis and automated staffing support continue to make up the predominance of identified needs for PSA/PPM application enhancements.

System consolidation is being talked about more now that a growing overlap of data exists between today's PSA/PPM systems and HR systems such as HCM tools.

Other: • Associate growth, empowerment and retention

Survey Summary



Survey Summary

- 1 Similar to our previous two surveys on this topic, the majority of companies, regardless of domain, continue to feel their skills tracking and management capabilities are areas for improvement. Addressing the basics of being able to characterize resource supply through role definition and building and managing an effective skills database continue to be among the top challenges to achieving RM effectiveness.
- 2 The technology supporting skills tracking and management is getting better, but improvements are still needed to reduce the use of spreadsheets and provide more support for automated staffing, analysis capabilities, and most recently more attention being paid to the growing overlap of information between today's PSA/PPM tools and HR systems like HCM tools.
- 3 While there are clear best practices for the creation, maintenance, and management of skills data to support Just-in-Time Resourcing® capabilities, this survey highlights this area as a critical gap that continues for the industry as a whole. The RMI will continue to emphasize this foundational area and provide help and education to assist with improvement.



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