



Marrying Supply with Demand in an Unpredictable Economic Environment within Services Organizations

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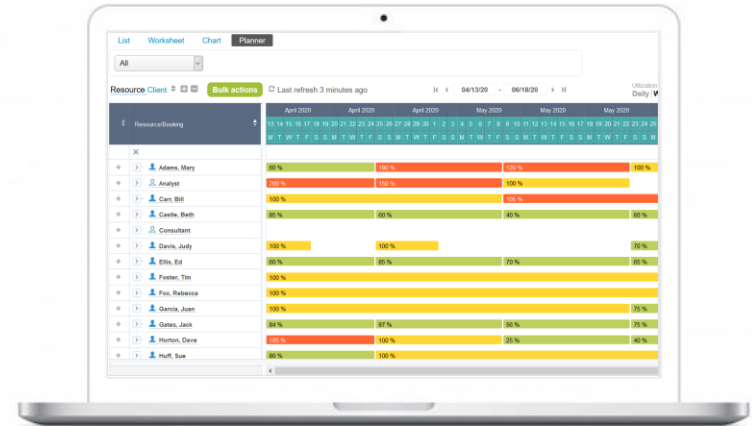
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In this webinar, we will discuss how Services organizations can navigate the uncertain economic environment by:

- Optimizing resource management
- Adjusting sales strategies
- Maximizing visibility into key business metrics with real-time reporting

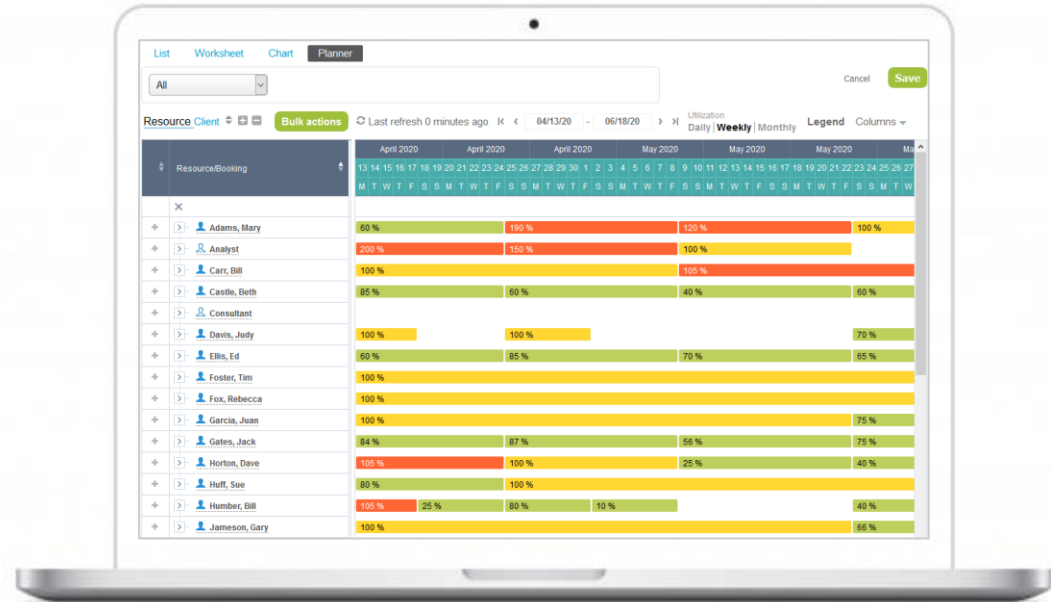
Things have changed dramatically in the last few weeks...

- How do you improve your ability to make resourcing decisions quickly?
- Challenge:** With clients cancelling work, or pushing work – Project timelines are changing, resource visibility is critical
 - Solution:** Need a flexible solution that provides real-time visibility into skills, location, availability



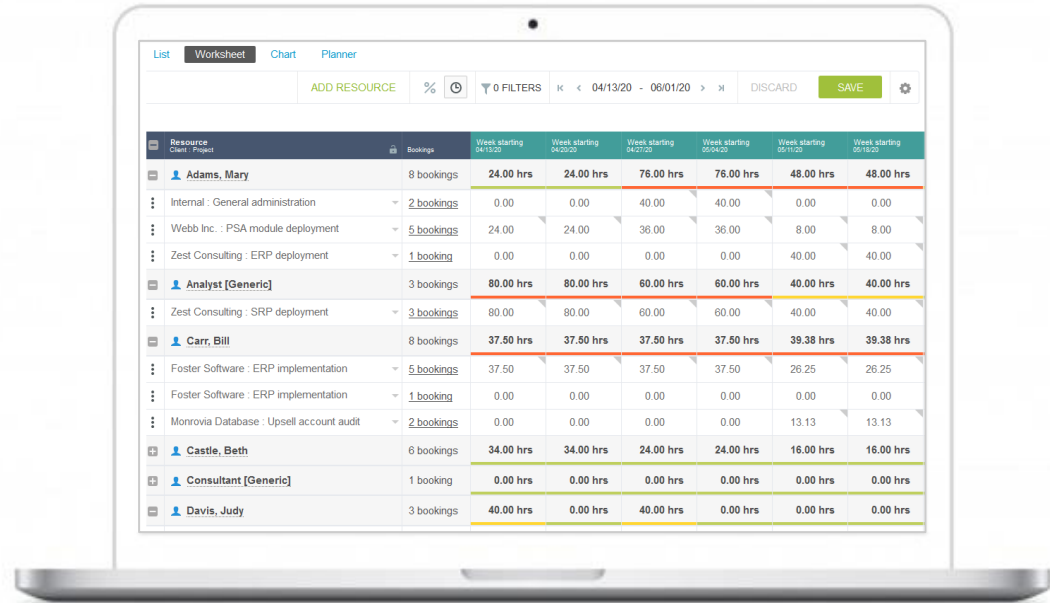
Things have changed dramatically in the last few weeks...

- Visualize forecast utilization across your workforce



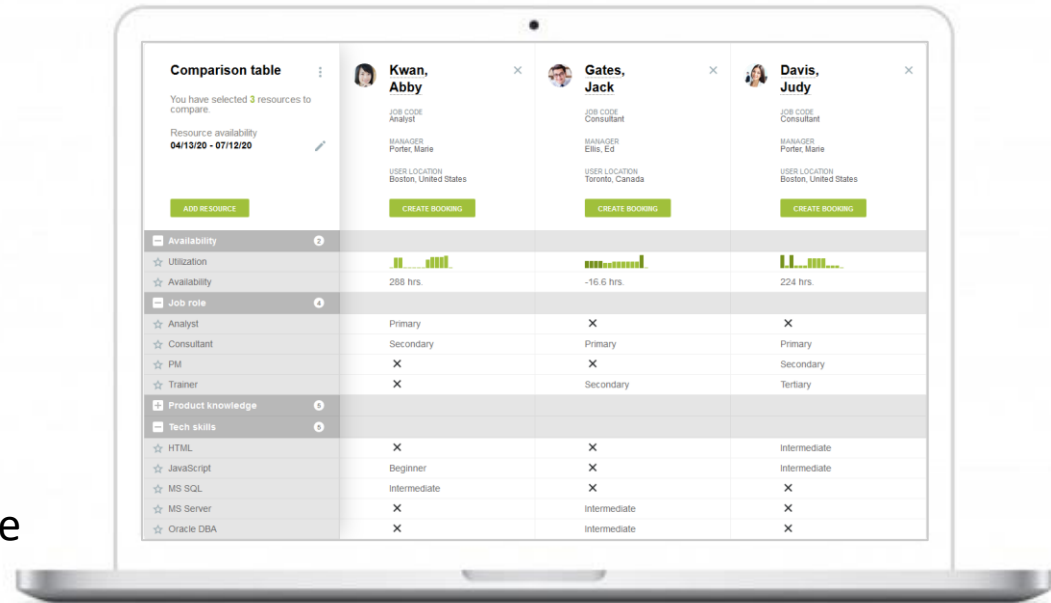
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- Implement top-down or bottom-up approach to planning future hours



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- Visualize forecast utilization across your workforce
- Implement top-down or bottom-up approach to planning future hours
- Search for and compare resources in order to optimize project staffing

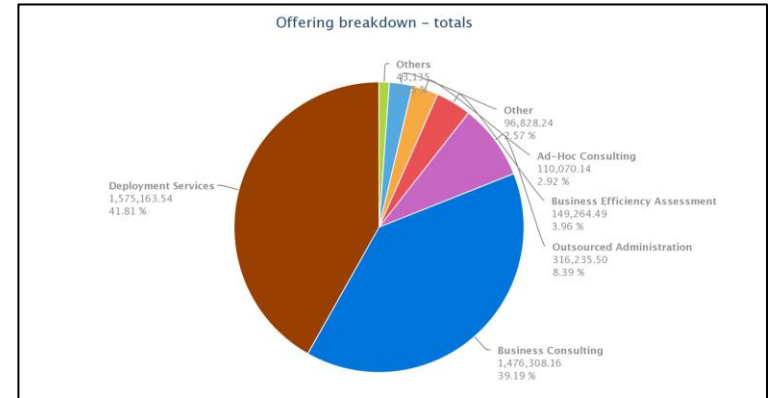


Things have changed dramatically in the last few weeks...

How should you adjust your sales strategy in response with current trends?

❑ **Challenge:** Pipeline of new work started slowing and it became apparent this downturn would last longer than a few months. It was apparent we needed a short term plan to help us strive in this new economy.

❑ **Solution:** Review your sales strategy, what industries/services should you be focusing on to backfill pipeline– plug the gap strategically.



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How should you adjust your sales strategy in response with current trends?

- ❑ **Challenge:** Companies are re-budgeting and re-prioritizing project work.
- ❑ **Solution:** Evaluate your pricing strategy for new work to feed the funnel. Service companies need to balance profitability versus utilization.



How should you adjust your sales strategy in response with current trends?

- ❑ **Challenge:** With new prospect's work requests getting delayed or cancelled, we needed a new source of work.
- ❑ **Solution:** Focus on your existing customers for work that may have been identified in the past, but was never a priority.



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How should you adjust your sales strategy in response with current trends?

- ❑ **Challenge:** Customers with initiatives that are still prioritized are looking for funding assistance.

- ❑ **Solution:** Investigate alternative funding options for your prospects to pay for your services.
 - *Flexible subscription costs*
 - *Payment deferrals*
 - *Bundling services and licenses*



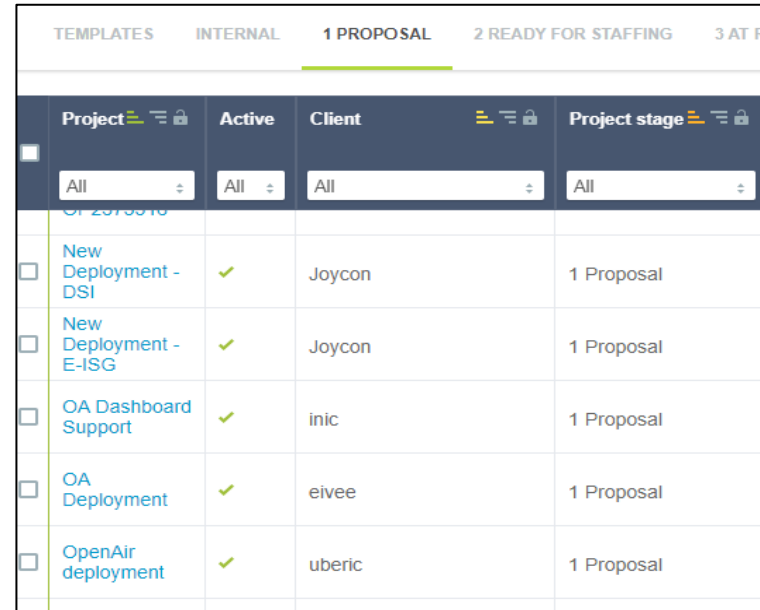
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How should you adjust your sales strategy in response with current trends?

❑ **Challenge:** Pipeline is drying up, current work (backlog) is not going to be enough to keep everyone fully utilized for an extended period.

❑ **Solution:** Evaluate your pipeline of proposed projects: how many are at risk of being postponed or cancelled?

- Supply vs Demand reports



The screenshot shows a dashboard with a navigation bar at the top containing 'TEMPLATES', 'INTERNAL', '1 PROPOSAL' (highlighted), '2 READY FOR STAFFING', and '3 AT R'. Below the navigation bar is a table with columns: 'Project', 'Active', 'Client', and 'Project stage'. Each column has a dropdown menu set to 'All'. The table contains five rows of data, each with a checkbox, a project name, a green checkmark in the 'Active' column, a client name, and '1 Proposal' in the 'Project stage' column.

Project	Active	Client	Project stage
<input type="checkbox"/> New Deployment - DSI	✓	Joycon	1 Proposal
<input type="checkbox"/> New Deployment - E-ISG	✓	Joycon	1 Proposal
<input type="checkbox"/> OA Dashboard Support	✓	inic	1 Proposal
<input type="checkbox"/> OA Deployment	✓	eivee	1 Proposal
<input type="checkbox"/> OpenAir deployment	✓	uberic	1 Proposal

Things have changed dramatically in the last few weeks...

- How has the need of reporting changed?
- **Challenges:** While it is important to make wise decisions, they must also be timely. Data required to make a wise decision, as well as people providing the data, resides in multiple locations.
- **Solution:** A web-based platform, providing a single source of data to render reports (Historical, Real time, Forecasting).



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KEY REPORTS
PROJECT STATE
RESOURCE FORECAST
CASH FLOW



Things have changed dramatically in the last few weeks...



PROJECT STATE REPORTING

Client	Project	Item date	Entered by	Overall risk tag	Budget risk tag	Schedule risk tag
Recreational Outfitters	Custom web services	08/19/19	Dale Muscat	On track	On track	On track
Falcon Systems	Mobile platform integration	10/13/19	Dale Muscat	On track	Needs attention	On track
Red Rivers Consulting	ERP deployment	10/22/19	Dale Muscat	On track	On track	On track
Red Rivers Consulting	ERP integration	10/05/19	Dale Muscat	At Risk	Needs attention	At Risk
Magneto Services	Bi-directional integration	07/01/19	Dale Muscat	On track	On track	On track
Cooper Software	Server integration	12/31/19	Larry Nelson	Needs attention	Needs attention	On track
Pied Piper	Daily user count audit	12/20/19	Larry Nelson	On track	On track	On track
Pied Piper	Daily user count audit	12/27/19	Kathryn Glass	Needs attention	On track	At Risk
Pied Piper	Daily user count audit	01/03/20	Kathryn Glass	On track	Needs attention	On track
Red Rivers Consulting	ERP deployment	11/18/19	Larry Nelson	On track	Needs attention	On track
Red Rivers Consulting	ERP deployment	12/18/19	Larry Nelson	Needs attention	At Risk	Needs attention
Red Rivers Consulting	ERP deployment	01/13/20	Larry Nelson	On track	On track	On track
Allima Technology	System Deployment - T&M	08/11/20	Marc Collins	On track	On track	On track
Allima Technology	Bus Intelligence Tool Configuration	08/11/20	Marc Collins	Needs attention	On track	Needs attention

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PROJECT STATE REPORTING

The screenshot displays a project management interface. On the left, a 'News Feed: Daily user count audit' is visible, containing five entries with various statuses: 'ON TRACK', 'COMPLETED', 'NEEDS ATTENTION', 'ON TRACK', and 'OFF TRACK'. The main area shows a project overview with a 'Project status: ON TRACK' indicator and 'Project progress: 52%' shown as a green bar. A 'Reports' panel on the right lists 17 items, including 'PRJ - Planned vs. Actual Hours', 'PRJ - Open Risks', 'PRJ - Open Issues', 'EXP - Billable Project Expenses', 'EXP - Project Expenses by Item', 'EXP - Project Expenses by User', 'PRJ - Budget Management [Cost]', 'TME - Project Timesheet Hours', 'INV - Charge Billing Detail', and 'REV - Revenue Detail'. A 'View news feed' button is also present.

Things have changed dramatically in the last few weeks...



Financial Analysis for 04/01/20-07/31/20 - CASH FLOW- Project Financial Analysis - Filtered by: Project stage

[show all](#)
[hide all](#)
[modify report](#)
[re-run report](#)



Client	Project	Budget (USD)	Projected billing (USD)	Projected cost (USD)	Projected profit (USD)	Projected profit (%)
▸ Global Information		\$509,000	\$474,132	\$91,043	\$383,089	81.00%
▾ United Software		\$1,544,332	\$1,564,101	\$427,768	\$1,136,333	73.00%
	Add-on services	\$1,544,332	\$1,564,101	\$427,768	\$1,136,333	72.65%
▸ Damus Inc.		\$150,000	\$364,160	\$74,677	\$289,483	79.00%
▸ Luxis		\$540,000	\$542,560	\$103,280	\$439,280	81.00%
▸ Motiva Inc.		\$25,000	\$82,400	\$15,360	\$67,040	81.00%
▸ Webb Inc.		\$875,000	\$879,700	\$176,250	\$703,450	80.00%
▾ Cooper Software		\$2,450,000	\$2,467,720	\$469,818	\$1,997,902	81.00%
	HRIS system configuration	\$1,500,000	\$1,590,200	\$293,490	\$1,296,710	81.54%
	PSA implementation	\$250,000	\$248,880	\$42,600	\$206,280	82.88%
	Consulting services	\$500,000	\$409,400	\$91,984	\$317,416	77.53%
	Admin training	\$200,000	\$219,240	\$41,745	\$177,495	80.96%
▸ Tinnerman Group		\$981,415	\$877,673	\$181,061	\$896,612	79.00%
▸ Monrovia Database		\$308,659	\$308,210	\$57,456	\$250,755	81.00%
▸ Altima Technology		\$2,425,000	\$2,425,735	\$413,969	\$2,011,766	83.00%
▸ Fernhill Solutions		\$1,689,863	\$1,621,637	\$272,203	\$1,349,434	83.00%
▾ Pied Piper		\$36,000	\$144,020	\$31,590	\$112,430	78.00%
	Daily user count audit	\$36,000	\$31,520	\$7,140	\$24,380	77.35%
	Intelerad Rev Rec	\$0	\$112,500	\$24,450	\$88,050	78.27%
▸ Steen Solutions		\$100,000	\$85,684	\$18,120	\$67,563	79.00%
▸ Foster Software		\$184,950	\$179,321	\$31,629	\$147,692	82.00%
14 rows (7 sub-rows)		\$11,819,219	\$12,017,053	\$2,364,224	\$9,652,829	80.00%

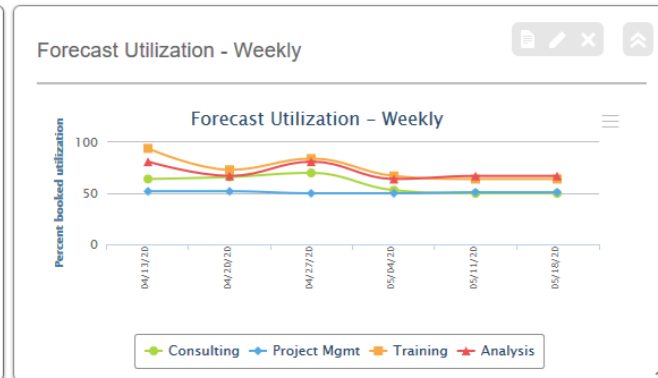
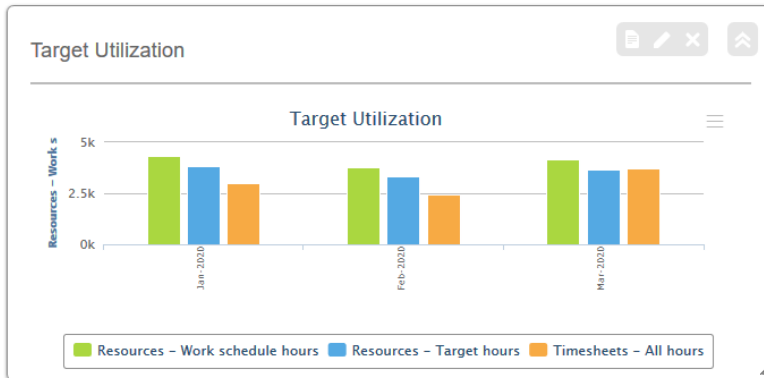
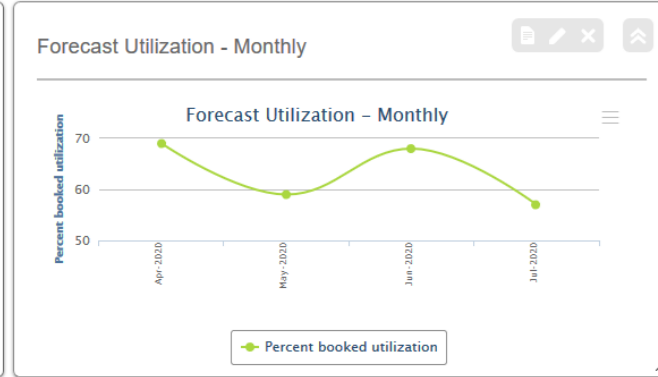
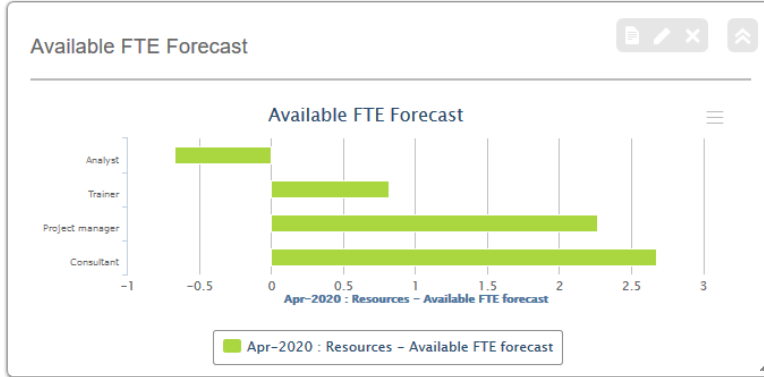
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- How do you optimize your resource utilization?
 - ❑ **Challenges:** Difficult to “marry” resource supply information with Pipeline demand information.
 - ❑ **Solutions:** Backlog plus pipeline revenue data combined with forecasted schedules (creating gap analysis by role).

Things have changed dramatically in the last few weeks...



Financial Overview Project Overview **Staffing Overview** x



Things have changed dramatically in the last few weeks...



Monthly Job codes Report - RES - Supply vs. Demand Report - Filtered by: Job code (04/01/20 - 09/30/20)

[▶ show all](#)
[▶ hide all](#)
[modify report](#)
[return to dashboard](#)
[re-run report](#)

Job code/User/Project	APR-2020			MAY-2020		
	Resources - Booked FTE	Resources - Quantity on staff (Periodic)	Resources - Available FTE forecast	Resources - Booked FTE	Resources - Quantity on staff (Periodic)	Resources - Available FTE forecast
▶ Analyst	6.54	5.88	-0.67	5.58	5.88	0.30
▶ Consultant	6.26	8.94	2.68	4.89	8.94	4.04
▶ Project manager	5.67	7.94	2.27	5.54	7.94	2.40
▼ Trainer	4.12	4.94	0.82	3.75	4.94	1.19
▶ Huff, Sue	0.95	1.00	0.05	1.00	1.00	0.00
▶ Oates, Brian	0.96	1.00	0.04	1.00	1.00	0.00
▶ Jameson, Gary	0.73	1.00	0.27	0.92	1.00	0.08
▶ LaFrak, Pierre	0.79	0.94	0.15	0.53	0.94	0.41
▶ Humber, Bill	0.70	1.00	0.30	0.16	1.00	0.84
▶ Trainer	0.00	0.00	0.00	0.14	0.00	-0.14
4 rows (6 sub-rows)	22.59	27.69	5.10	19.76	27.69	7.93

Bottomline, take action!!

- Analyze your resource strategy and take action to minimize the gaps
- Adjust your sales strategy to fill the gaps and put your business in the best position for survival
- Report on your current state and future state of your service organization. Know where you stand!!
- Develop an overall strategy based on marrying resource and sales strategies using key data from your PSA system
- Optimize your Professional Services Automation tool (PSA): Gain visibility into your service organization and trust your data

Questions?

