

# ***Guide to Buying Resource Management Software***

# Introduction

## ***Why should I read this guide?***

---

A company's people are typically its biggest expense. Inefficient resourcing has a huge impact on the growth and profit of the entire business, yet so many companies find this difficult to control. Most people are aware of the problem and try to solve it via a homemade solution – spreadsheet/database – which often makes the issue worse. This is where resource management software comes in.

***A 1% increase in utilisation for  
20 consultants could mean tens  
of thousands a year in extra profit.  
What would this mean for your business?***

We presume that by this stage you've got a good idea of what resource management can do for your business, and how it will help you grow.

Implementing resource management software is a big decision, and one that shouldn't be taken lightly. It involves a significant investment of time and money, but more than that – it has the potential to truly change the way your business operates, and so making the wrong decision could cost you strategically as well as in wasted efforts.

This guide will take you through the steps to make that purchase decision to ensure that you get maximum success and return on your investment.

This guide will teach you:

- How to build a business case for resource management software
- How to identify the problems you need to solve
- How to make the right decision for your business

# Contents

<b>1. Business Case</b>	<b>04</b>
1.1 Addressing Stakeholders	04
1.2 Current Situation	04
1.3 ROI	05
1.4 Cost of Delaying	05
<b>2. Identify Stakeholders</b>	<b>06</b>
2.1 Select the right stakeholders	06
2.2 Identify business issues	06
2.3 Get support	07
<b>3. Identify Needs &amp; Requirements</b>	<b>08</b>
3.1 Needs and Goals	08
3.2 How Can Software Help?	09
<b>4. Evaluation</b>	<b>10</b>
4.1 Features	10
4.2 Implementation	10
4.3 Support	10
4.4 Customer Success	11
4.5 Dealing with Vendors	11
<b>5. Speak to References</b>	<b>12</b>
<b>6. Completing the Purchase</b>	<b>13</b>
<b>7. Case Study: Precursive &amp; Agilisys</b>	<b>14</b>

# 1. Business Case

Congratulations. You've made the decision to purchase resource management software, and you're ready to operate more efficiently.

You're ready to solve problems like:

- Difficulty forecasting availability
- Clients complaining they can't get favourite consultants
- Paying for contractors instead of using employees

Whatever the driving reason, you know that your business will run better if you can only answer those two all-important questions: Who's available? And when?

So where do you begin? Perhaps controversially, we recommend that you start your purchase decision with your business case. This may seem counter-intuitive, but it actually makes sense to have clear reasons for proceeding before you begin conversations with stakeholders and vendors. The earlier you gain support from others within your organisation, the easier it will be to secure stakeholder approval and funding.

After all, if you don't know why you're buying this software – why are you buying it?

Preparing your case at the beginning also means you'll have a clearer idea of the exact problems you need to solve – and so will your stakeholders. A study by PM Solutions found that poor stakeholder engagement was one of the most common obstacles in projects that failed. Understanding the business needs and objectives driving this project is key to success – both when it comes to getting stakeholder buy-in, and with achieving goals overall.

A good supplier will help you build a business case for internal use once you're in conversations, but here are some things you can do to help the initial process.

## 1.1 Addressing Stakeholders

---

Given the often disparate stakeholders, it's important to identify one key message that everyone can agree on, e.g. 'We need to raise productivity in order to increase profitable growth'. We cover stakeholders in more detail in the following section, but at this stage, you should be aware of how people are judging your business case. Everyone will have their own agenda: consider other viewpoints, but try to bring the focus to one key goal that drives buy-in from all involved.

## 1.2 Current Situation

---

Prepare an analysis of your current situation. Highlight the problems - in all areas - your company is facing, and outline the actual numbers. This should include the scope of associated business challenges and their financial impact. You'll probably find that some stakeholders are unaware of these issues: now is your chance to educate them.

## 1.3 ROI

---

This almost goes without saying, but ROI will be the biggest argument under your belt. Use existing data to estimate this as accurately as possible. If you're in conversations with suppliers, ask your provider to help you. Numbers can be immensely powerful when there are solid calculations behind them!

Decide what figures would be relevant for your business, and estimate the potential return.

***In the example we used earlier, for a team of 20 consultants earning £40,000 and being charged out at £500 a day, a 1% increase in utilisation would mean an extra £22,000 a year in profit.***

***Want to calculate these figures for your business?  
Try out our [utilisation calculator](#) >***

## 1.4 Cost of Delaying

---

One oft-neglected factor that's actually hugely important is the cost of delaying. It's all very well everyone coming to a decision eventually; but when? When a solution is going to drastically cut costs, every day delayed comes at its own price. If someone wants to postpone the decision until the next board meeting, point out how much a month's delay will accrue in unnecessary revenue leakage.

And don't underestimate the effect of the no-decision: failure to make a decision is actually a decision to stay with what you already have. This in itself could end up costing your business considerably.

# 2. Identify Stakeholders

So, who will the specific stakeholders for this project be? Everyone with an established interest should have been addressed when preparing your business case, but there may be some you haven't considered.

There may also be some people who'll have to approve before you can proceed, and you should be clear on who they are and how to convince them.

## 2.1 Select the right stakeholders

---

Who'll have an opinion in this? The decision to work with a new system will affect many people. In our experience, those with the biggest stake in a resource management implementation tend to be the COO or Head of Services, the CTO, and the CFO.

But there are other people whom this investment will affect on a daily basis: Resource Managers, System Administrators, Project Managers, and your consultants themselves. All of these people will be impacted by this decision, as they'll be the ones actually using the software.

Make a list of everyone who would use the platform, and everyone who would have a vested interest in the choice of software. It's probably unfeasible for you to speak personally to everyone involved, but interviewing a subset of each role will help you get a clearer picture of the aims and concerns of each group.

## 2.2 Identify business issues

---

While you need to speak to others within the business, **don't get too many people involved in the decision**. If every member of staff sends you a list of requirements, you'll never find a solution to match anything. Really you want no more than five people directly involved, and ideally less than three.

Ask employees what problems they currently face, and what the impact of those problems is. Issues may be brought to light that you hadn't considered, and now is the time to make note of them.

***Consultants might hate filling out their timesheets because they can't do it on the go, or can't recall the timesheet if a mistake is made.***

***Resource managers may hate having to phone round the entire team to see who's available to work on a project.***

***Your CFO may resent the cost spent on contractors when she knows there are consultants available in-house.***

Once you've done your research, make a list of the key issues you absolutely have to solve, and a list of the problems you can live with. You need to distinguish between the 'nice to have' and the 'need to have'. At this stage, it can be tempting to start listing features you believe will rectify these obstacles. Try to resist this urge. Your vendor will have a better idea of how to resolve these problems than you do. Go to them with the issues you need to overcome, and let them make the suggestions.

## **2.3 Get support**

---

As we mentioned previously, unless you're incredibly lucky, it's unlikely you'll be able to make this decision on your own. Identify who the key players in this are, and who you want – or need – to have involved. Do you have signoff authorisation? Can you get cross-departmental support?

Establish who needs to be involved, and ensure that everyone understands why your business needs resource management software and how it will benefit. Identify the agreed business issues that resource management software will help to fix.

# 3. Identify Needs & Requirements

Now that you have the right group of stakeholders behind you, you need to outline what exactly to ask for. At this point, the really key thing again is not to focus on features, but on problems, cost goals and outcomes.

---

Moving away from thinking about an obvious solution means that you might be in a position to benefit further from your vendor. When Precursive was looking for a marketing automation solution, we investigated a few different options. Ultimately, we decided to go with a vendor that not only had a great solution, but would provide us with success guidance and additional business opportunities.

---

## 3.1 Needs and Goals

---

You've already identified what problems you need to solve, and the financial impact to your business of these problems. Now is the time to establish the goals you'd like to achieve. What would success look like for your business? What are you aiming for? Think beyond 'an easier way to submit timesheets' and 'accurate forecasting' to 'a 30% decrease in project costs' and 'a 10% increase in customer retention'. What metrics would you use for success?

Because ultimately, you're not making a software purchase: you're purchasing growth. Find out how the vendor will help your business grow, not just solve the problems you're already aware you have. Prepare for a conversation around this, and what you're hoping to achieve, rather than one around a specific features set.

So make sure you consider this when talking to potential vendors: What else can they add? How else can they support you?



***Address the business pain points you need to solve, even beyond what you consider the boundaries of your vendor's solution. Ask yourself: can the vendor help us in any additional, less obvious way? What advice can they offer?***

---

For example, Precursive purchased a telephony app, and as part of the deal we arranged a call with the Head of Sales to understand how they used the product themselves and what best practices they could recommend. We also secured a call with the CFO about strategy, and asked all the questions we could think of! We made sure we got everything we could out of the deal, and it proved hugely beneficial to us.

---

### **3.2 How Can Software Help?**

---

It's easy to get carried away with an exciting feature set, but at this stage you really need to tie your requirements back to your goals. What will make a difference to your business? List the actual capabilities you are looking for. It will vary depending on your specific requirements, but these are examples of things you should be able to do with your chosen solution:

- Forecast accurately
- Have a clear overview of who is available and when
- Run a range of reports
- Integrate seamlessly with CRM and finance software
- Drag and drop resource assignments
- Submit timesheets on mobile
- Get visual insights on all metrics that matter to you
- Have real-time visibility on project performance

***Want more examples?***

***Download our [resource management requirements list](#) >***

As you research different vendors, you'll probably find different features that appeal. Think about how these features will actually impact your business, and even consider ranking these in order of importance. This will help you clearly prioritise the things that will grow your business most effectively and efficiently.

# 4. Evaluation

By this time, you'll have narrowed your options down to a shortlist of vendors. Initial research done, now is the time to reach out and make contact. What questions should you be asking? How should you be evaluating and comparing your potential providers?

## 4.1 Features

---

Don't be swayed by an impressive list of features you'll never need, but beware of neglecting future considerations. Are your requirements going to change as the company grows? Ask about real-world use cases, and focus on how you can use each feature to increase efficiency and grow your business.

## 4.2 Implementation

---

Implementation should be a big factor in your considerations, and not just in terms of the fee. The success of the implementation determines the success of the solution. It's important the software is set up quickly, and set up well, so that you can start seeing ROI as soon as possible, and drive adoption across the board.

Find out what information you'll require, and when, and what level of support you'll have. These can all make a big difference to the level of your success, and should contribute heavily to your decision.

Ask:

- What does implementation look like with each vendor?
- How long does it take?
- How well does it integrate with other apps we use?
- Who does the implementation: is it in-house or third party?
- How does the vendor ensure maximum adoption?
- What level of user training is required? How does this work?
- How should we time and structure communications?
- What type of team do we need on our side?
- How much time will this team need to invest?
- Why/how have implementations gone wrong in the past?

## 4.3 Support

---

A good Support system is hugely important in any software purchase. Users may get stuck, things may go wrong, and you need to ensure you've got someone to call on in your hour of need.

Ask:

- What level of technical support is available?
- Is support included in the overall package, or is it an added extra?
- Who handles the support? What level of expertise/access does the support team have?
- What hours does support cover?
- What training and support documentation is available?
- Through what channels is support available? Email? Phone?
- What's the response time?
- In what timezone is the support desk located?
- What language is support available in?

## 4.4 Customer Success

---

Customer Success is often confused with support, but the two are distinctly separate. Customer Success is dedicated to helping you grow as a business and make the most out of your investment, not just advising you through technical issues.

Any solution is worthless unless it actually helps you solve your problems and grow your business, and there should be processes in place ensuring you get the most out of your software and are continuously improving. An effective customer success team will check your progress, suggest new strategies to try, and help you learn from the best practices of others. Customer success is how you get true value from your purchase, so make sure it's a key consideration in your review.

---

Referring back to our marketing automation provider: one of the things that really stood out about their offering was the the daily customer success sessions they hold online. Every day there's a dedicated hour during which clients can call in to a webinar and ask any questions they might have around the software, or best practices, or even marketing content - and experts are on the other end of the line to help. This really adds value to the solution, and is something we've found particularly useful.

---

Ask:

- How does the provider help us decrease inefficiency and improve our processes?
- How do they help us get the most out of our investment and really grow our business?
- What level of expertise does their team have?
- Can they give us an example of how they've helped other customers be successful?
- How often will we have access to key advisors?
- Will we have a dedicated Customer Success Manager? Where is he/she located?
- How will they help us measure success?

## 4.5 Dealing with Vendors

---

It's also important for you to set expectations when dealing with vendors. What are the timelines? Who needs to give their approval? Who is the best point of contact? Make sure that you're clear on the basics on both sides, and you'll find that the whole process goes much more smoothly for all involved.

**Need more guidance?**

**Download our [resource management evaluation checklist](#) >**

# 5. Speak to References

*References are integral to any evaluation. Speaking to someone with firsthand experience of the solutions on offer really helps you understand what using the software will be like, and what challenges - if any - you are likely to face.*

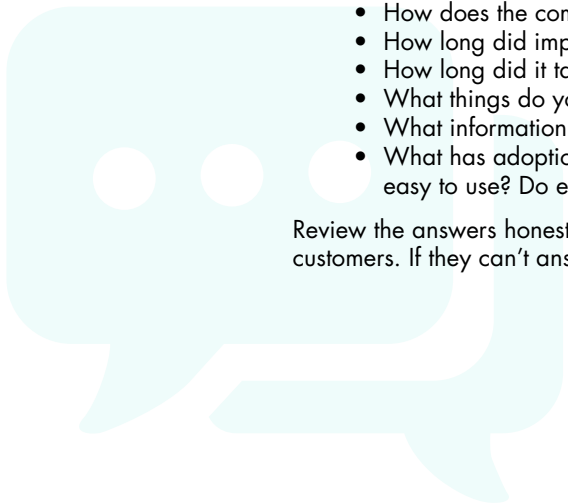
This is the time to soothe fears of certain members of the team, or to check whether assumptions you've made about the way the software would run for you have been proven true elsewhere.

Think carefully about who you want to speak to. Someone in your industry?  
A company that also struggled with an issue you're currently facing?  
Someone who had the same concerns about the product as you?

Prepare your questions in advance, particularly covering anything specific. You should definitely be asking things around:

- How does the company deal with problems and support issues?
- How long did implementation take? How was the process?
- How long did it take to see effective results?
- What things do you wish you'd known before purchasing?
- What information did you have to provide for implementation?
- What has adoption been like in your company? Is the software easy to use? Do end users *like* using the software?

Review the answers honestly, and be aware that you'll always hear from the happiest customers. If they can't answer a specific concern you have, ask for a reference who can.



# 6. Completing the Purchase

This is it. You've gathered all of the information you could find, you've gained approval from the rest of your team, and now it's time to make the final decision.

Choose the solution that will best help you meet your business goals and achieve the highest ROI. Beware of comparing like-for-like on price when different solutions are offered. Make sure that you've discussed potential issues with every decision maker in your group, and that you've got buy-in to move forward with your preferred vendor.

Beware of things that might disrupt your purchase - e.g. structural changes (new CEO, business acquisition), or office politics (other contenders for the budget). Anticipate any change that is not directly under your control and evaluate possible actions before they are raised.

Find out what you need to know and prepare for implementation, and check that you can commit to these requirements before signing the contract.

That's it. You're done. And now: relax and enjoy this moment - you've earned it!

***For maximum success and to prove ROI, you should be tracking business metrics prior to implementation and throughout. Keep a record of your numbers so you can compare before and after figures, and see the progress and improvements you've made!***

# Case Study: Precursive & Agilisys

***See how Agilisys worked with Precursive for success***

---

Agilisys is an IT and business software and services provider, helping clients to transform their businesses through a suite of citizen-centric technology products as well as centres of delivery excellence around the UK.

Prior to implementing Precursive, resourcing of around 100 consultants at Agilisys was managed via complex spreadsheets that one person had responsibility for. Precursive's software allows Agilisys to keep track of resources, with clear visibility over projects and availability of consultants.

**Download [case study](#) >**



