

LEADERSHIP GUIDE

The Executive Guide to Professional Services Automation

Align the decisions that shape services growth.



A practical working document

Use the examples and review tools to make the next decision clearer. Start with one engagement, one owner and evidence your teams can verify.

IN THIS EDITION

- 01** Shared operating context
- 02** Demand and capacity
- 03** Delivery and risk
- 04** Financial visibility
- 05** Worked example and review tools

FRAMEWORK / 1

Connected context

A connected decision needs evidence, ownership and a clear handoff.

01 Connected context

Start with the relationships between opportunity demand, skills, assignments, projects and financial outcomes. An isolated data point rarely explains a services decision. The useful context is the chain showing how a change in one team's plan affects the others.

REVIEW POINTS

- Linked records
- Shared definitions
- Business context

02 Risk signals

Use operational signals to focus attention on potential delivery, capacity and revenue issues. Distinguish observed facts from forecasts and make uncertainty visible. Teams need to understand why a warning matters before they can decide how to respond.

REVIEW POINTS

- Signal source
- Risk driver
- Forecast confidence

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 2

Demand before the project starts

A connected decision needs evidence, ownership and a clear handoff.

03 Demand before the project starts

Translate upcoming work into dated resource requirements. Capture the skill, effort, duration and confidence of each need. A likely opportunity and a signed project should remain distinguishable so planners can model scenarios without double-booking people against uncertain demand.

REVIEW POINTS

- Skills required
- Demand confidence
- Start and end dates

04 Capacity with real constraints

Available capacity is not simply headcount. Subtract existing assignments, leave, working patterns and internal commitments from the planning horizon. Compare supply with dated demand by skill and role, and inspect upcoming releases before deciding that a gap requires a new hire.

REVIEW POINTS

- Working calendar
- Leave
- Planned releases

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 3

Project context and ownership

A connected decision needs evidence, ownership and a clear handoff.

05 Project context and ownership

Give every project a clear scope, accountable manager and delivery structure. Keep the team aligned on the work being delivered and the commitments behind it. Project context connects scheduling and execution decisions to the client outcome instead of leaving the plan as an isolated task list.

REVIEW POINTS

- Project owner
- Scope
- Delivery commitments

06 Risks, assumptions, issues and dependencies

Capture RAID items with an owner, impact and next review. Distinguish a potential risk from an issue already affecting delivery. Escalations should connect the operational cause to the milestone, capacity or commercial consequence, making the required decision clear.

REVIEW POINTS

- RAID owner
- Impact
- Mitigation action

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

FRAMEWORK / 4

Revenue with an operational basis

A connected decision needs evidence, ownership and a clear handoff.

07 Revenue with an operational basis

Build the forecast from work that can realistically be staffed and delivered. Keep opportunity assumptions, committed work and billing expectations distinguishable. When a date or allocation changes, review the downstream revenue effect instead of updating the finance forecast independently of delivery.

REVIEW POINTS

- Committed work
- Forecast assumptions
- Delivery dates

08 Confirmed leakage versus estimated exposure

Keep confirmed blocked revenue separate from modelled exposure. Confirmed amounts should be traceable to transactions; estimates depend on explicit assumptions. Adding both into one total can mislead decision-makers and obscure whether an intervention is resolving an existing blockage or preventing a possible one.

REVIEW POINTS

- Transaction evidence
- Model assumptions
- Separate totals

THE HANDOFF TO AGREE

What does the next team need from this decision? Record the source, owner and review date before passing the work forward.

WORKED EXAMPLE

A utilization figure needs a denominator.

Illustrative scenario - not a customer result or a product performance claim.

Twelve people provide 480 contracted hours. After 40 hours of leave, available capacity is 440 hours. With 330 approved billable hours, utilization is 75% of available capacity, or 68.75% of contracted time. Both calculations are arithmetically valid; only a stated definition makes the measure useful.

480 h

Contracted time

440 h

Available capacity

330 h

Billable hours

$330 \div 440 = 75\%$ of available capacity

$330 \div 480 = 68.75\%$ of contracted time

Define

State the period, population, units and calculation.

Verify

Trace the number to source records; date the evidence.

Act

Assign an owner and state what would change the decision.

IMPLEMENTATION

A practical 30 / 60 / 90-day cadence.

Start with a bounded workflow. Extend only when the handoffs can be explained and repeated.

01

DAYS 1-30

Establish the baseline

Choose one workflow and one accountable sponsor. Map inputs, owners and exceptions. Agree the decision to improve and capture a baseline using current records.

Output: a workflow map, owner and baseline.

02

DAYS 31-60

Run a bounded pilot

Use the same definitions in recurring reviews. Test missing data and exception paths. Track whether teams can explain decisions and complete handoffs without additional reconciliation.

Output: a tested handoff and exception log.

03

DAYS 61-90

Decide what to extend

Review evidence with participating teams. Resolve recurring gaps before broadening scope. Document ownership, training needs and the conditions required for the next rollout.

Output: an agreed expansion or improvement plan.

WORKING SESSION

Use one engagement as the test case.

A 45-minute review for the people who own the handoffs.

00-10 min

Frame the decision

Describe the engagement and the next commitment. State the decision, deadline and assumptions.

10-25 min

Review the evidence

Walk through dated demand, capacity, delivery commitments and financial context. Identify missing or contradictory records.

25-35 min

Resolve the handoff

Agree who supplies each missing input and who can approve the next action. Keep facts and estimates separate.

35-45 min

Commit and review

Write the action, owner and due date. Define the evidence to check at the end of the session.

PREPARE BEFORE THE SESSION

Bring one real engagement, its source records and the people who can approve the next handoff.

REUSABLE WORKSHEET

Record the decision and its basis.

Complete this page together. Keep assumptions visible and commit to a dated review.

Decision / engagement

What decision must be made, and by when?

Evidence / source records

Which records support it? Include dates and definitions.

Assumptions / missing information

What is uncertain or still needs validation?

Action / accountable owner

Who will do what, and who approves the handoff?

Review / outcome

What evidence will show whether the action helped?

REVIEW & NEXT STEPS

Make the framework part of the operating rhythm.

The value is in the decision that follows the review.

01 Before the review

Check that the evidence covers the same period and population. Confirm owners, units and approval status.

02 During the review

Investigate exceptions and changing assumptions. Do not combine estimates with confirmed transactions or treat activity as an outcome.

03 After the review

Publish the decision, rationale, owner and next review. Retain enough context for the receiving team to understand the handoff.

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