

Moore Kingston Smith select Dayshape, AI-powered resource management software, as its partner of choice for an innovative implementation project.

Replacing existing, long-standing software and systems can be daunting, time-consuming, costly, and hard to get right. This case study highlights how it can be done successfully at scale within a professional services firm.

The project:

Replace legacy software with a scalable, future-fit solution

Moore Kingston Smith was previously using a legacy resource management solution and manual processes to schedule people across its Audit and Accounts teams. To support its plans for growth, Moore Kingston Smith recognized the need to invest in an advanced resource management solution which could scale and streamline its processes.

Key goals:

- Reduce the administrative burden on the resourcing team
- Design a robust and accurate budgeting and scheduling process
- Gain data-driven insights for strategic decision-making

The software investment would form part of a wider initiative to transform resource management at the firm, driving operational efficiencies and improving the working experience of their people. The goal was to use advanced scheduling software to ensure task allocation is both optimal for clients and positive for the firm's people, reducing selection bias, enhancing skills, and promoting greater inclusion.

The implementation and necessary change management process would represent a significant undertaking for the firm.

Critical to success:

- Choosing the right software partner for the project
- Business adoption of new resource management processes
- A proactive change management approach

The solution:

Dayshape as a trusted software partner and driver of resource management transformation



The need for a scalable, strategic resource management solution

Challenge: Replacing the current resource management system

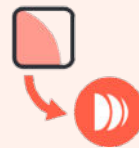
Having outgrown the current system, Moore Kingston Smith sought a solution that would support the firm's strategic growth objectives.

Our customer:

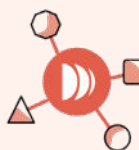


Moore Kingston Smith LLP is the London firm of the top 10 Moore UK network of accountants and business advisors, with over 70 partners and more than 700 people in the UK.

The project:



Firm-wide roll-out of Dayshape, replacing the previous system



Seamless integration with existing HR and practice management systems

Solution: AI-powered resource management software

Rather than seeking an upgrade of their existing system, Moore Kingston Smith saw the value in investing in an advanced solution which could scale alongside their business. This meant valuable time and budget would be invested into one transformational implementation project rather than multiple upgrades.

"We needed a resource management solution that could scale with us. With Dayshape we have a solution that is not just fit for now but fit for the future."



The need for transparent implementation information

Challenge: Understanding the implementation process

When it came to evaluating the right software partner, gaining insight into the implementation process was a top priority for Moore Kingston Smith. As Sarah Kirkman, Recruitment and Resourcing Lead at Moore Kingston Smith explains, *"You want to know the end product will work for you, but you also need confidence in how your chosen partner will help get you there."*

Solution: First-hand, transparent, peer-to-peer insight

To provide this, the Moore Kingston Smith team contacted a similar-sized firm that had previously undergone a Dayshape implementation. Making this connection provided the team with valuable insight into another firm's experiences with implementing Dayshape, the opportunity to use that firm as a sounding board and gain the knowledge and reassurance they needed to decide whether to proceed.



Seamless integration with existing systems

Challenge: Integrating existing HR and practice management systems

The seamless integration between Dayshape and Moore Kingston Smith's existing software systems was core to the implementation. To allow the firm to plan resources and financials in tandem, and monitor engagement performance in real time, fully integrating financial and time-tracking data was essential. In addition to the integration, the initial migration of bookings from the current resourcing system was key to the project's success to ensure the team could hit the ground running on go live.

Solution: Close collaboration to map integration needs

Key to the requirements gathering stage, the Dayshape team closely collaborated with the Moore Kingston Smith team to carefully map out their unique integration needs. The integration process was carefully scoped and managed by the project team, with frequent communication between Dayshape and Moore Kingston Smith's data team to ensure the required fields were included.

The implementation:

A project hinged on two-way communication and close collaboration



Collaborative project management approach

Challenge: The need for flexibility

Early in the implementation process, the project was challenged by an unexpected delay due to unforeseen personal circumstances within the Moore Kingston Smith team, meaning timelines had to be adjusted. Sarah Kirkman explains, *“When you are undertaking an implementation project of this size, you have to be able to flex and adapt to unexpected hurdles.”*

Solution: Regular, transparent communication between teams

Overcoming this relied on adaptability and a regular flow of transparent communication between project teams, enabling them to establish a shared understanding and problem-solve together. Of the communication between teams Sarah Kirkman reflects, *“Trust and understanding are really important to establish. The Dayshape project team were great, we had regular updates and weekly emails to keep us informed and on track.”*

“We were appreciative of the flexibility that the Dayshape team offered. Working with great people made the project a much easier and more positive experience.”

Challenge: Go live

To ensure Moore Kingston Smith experienced a smooth migration from the previous system.

Solution: Hypercare

Post-implementation Dayshape provided two weeks of hypercare to Moore Kingston Smith to support with any system issues, problems and queries. This meant the Moore Kingston Smith project team had immediate help on hand if required.

Of hypercare Sarah Kirkman says, *“This was a really beneficial offering and provided us with the assurance we could go-live to all users simultaneously, rather than taking a phased approach.”*



Proactive change management

Challenge: Changing ingrained behaviors

To achieve a firm-wide adoption of the new software Moore Kingston Smith knew the change management process would need careful consideration. Sarah Kirkman explains, *“As a team, we really wanted the project to succeed because we all could see the benefits that Dayshape would bring, but we had to acknowledge that changing ingrained behaviors is an ongoing process.”*

Solution: A gradual transition to automated scheduling

The Dayshape team worked with the team to configure their set-up so they could build acceptance and buy-in on a gradual basis. This meant a gradual transition from manual to more streamlined, centralized resource management processes at a pace to suit them.

“The resource management solution we were using before was quite limited, so the change to Dayshape was transformational. We needed a gradual and measured approach to achieve buy-in from our stakeholders and Dayshape worked alongside us to help us achieve that.”



Ongoing learning and support

Challenge: Making the most of Dayshape

The implementation of Dayshape was part of Moore Kingston Smith's journey to resource management transformation. The team receives ongoing learning and support to make the most of Dayshape's advanced features and maximize the benefits for their team and business.

"We are just scratching the surface of what Dayshape can do for us."

Solution: Dedicated Dayshape customer success representative

Post-implementation a new level of Dayshape supports the firm on its journey and ensures the firm maximizes investment. Sarah Kirkman shares, *"Our relationship with Dayshape remains really positive. We have scheduled calls every couple of weeks for ongoing product support and a bi-weekly call with our dedicated customer success representative. These ensure we are getting the most of Dayshape."*

"Knowing that we have this ongoing support is incredibly beneficial."

The impact: Dayshape transforms the resource management function into a strategic powerhouse



Adoption of new resource management software

Feature: Intuitive, user-friendly interface

Dayshape's easy-to-use interface made an immediate impact on the resource team making it easier to create and adjust resource plans. In addition, Sarah Kirkman noted, *"It was really interesting to see just how quickly our new team member was able to pick up Dayshape."*

"We love the interface, it's a dream to use. It is so easy to create and adjust our resource plans."

Benefit: Centralized resource management processes

Dayshape is intuitive and easy to use which meant adoption of the new software was straightforward for the wider team. New processes were also put in place to reduce the burden on the resourcing team, a key priority for the firm.

"The fact that the wider team can access the system simultaneously is a game changer."

Sarah Kirkman shares, "Previously, the resource team worked through manual resource requests, now everyone uses Dayshape to submit their forward planning. This has positively impacted our resource scheduling processes."



Streamlined scheduling and budgeting processes

Feature: Improved visibility of resource capacity and utilization

Dayshape's Gantt view made scheduling a clearer, more efficient process for Moore Kingston Smith. With a clear visualization of the current schedule and resourcing options available, the resource team can access all information in one system.

Benefit: Utilization and capacity improvements

With improved visibility of resources, Moore Kingston Smith can make improvements to overall utilization, making resource allocation a more informed and fairer process. From the Gantt, the resource team can easily assess availability alongside utilization heatmaps to help them identify where to distribute work more evenly, whilst maximizing billable time.

"We can flag utilization issues much earlier in the planning stages and reduce the risk of individuals being overburdened or clashes occurring."

Benefit: A more accurate and sustainable resourcing model

By identifying where individuals are overbooked the team can proactively resolve clashes and explore alternative resourcing options. Additionally, Moore Kingston Smith has been able to use overall resource capacity and utilization insights to forecast their resource needs.

"Looking ahead to forecast and highlight the need for additional resource has already had a beneficial impact."

Benefit: Investment in wellbeing and future career development

A next step for Moore Kingston Smith is launching skills-based AI-powered scheduling across the firm using Dayshape. This move reflects the firm's continued investment in the wellbeing and future career development of their people.

In addition to reducing the manual burden of allocating work for the resourcing team, Dayshape's skills-based scheduling ensures resource allocation is fair and matched to their people's skills and work preferences. This will allow Moore Kingston Smith to not only consider current skills, certifications, and work experience of resources when allocating work but also utilization rates, and whether the resource has already been given a task on a specific engagement.

Together, this suitability criteria provides a powerful metric which enables Moore Kingston Smith to provide career development opportunities for their people by enhancing skills and giving them exposure to different types of work. This in turn also brings benefits to clients by ensuring the best mix of people, skills, and knowledge are allocated to a job.

"We're looking forward to utilizing skills-based scheduling and work preferences to not only deliver for our clients, but also provide an enhanced, more enjoyable experience for our people here at Moore Kingston Smith."



Reporting insights for data-led decision-making

Feature: In-depth reporting and engagement economics

The Dayshape system provides engagement economics plus a full suite of reports.

"We like the engagement economics elements in Dayshape. Making data-led decisions and analyzing efficiencies is very beneficial."

Benefit: A more strategic resource management function

By integrating with the firm's practice management system, Dayshape's engagement economics has already allowed the resource team to make a strategic impact. Sarah Kirkman shares, *"When planning we can clearly see the budget, the number of resources requested, and easily highlight projects at risk of poor profitability."*

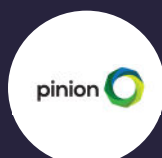
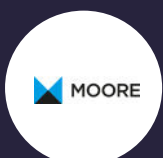
"Dayshape provides the insight and evidence we need to challenge people to make more informed resourcing decisions."

Supported by powerful metrics and the right resource management system, Moore Kingston Smith can provide engaging, developmental opportunities for their people, deliver top-quality work for satisfied clients, and empower the resourcing team to make quicker, easier and data-driven decisions.

The next step on their resource management transformation journey?

"I have recommended Dayshape to another area of our business and previously to colleagues within the Moore Global network."

Trusted by over 50,000 users



Request a demo

contact@dayshape.com
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 Dayshape