

MHA puts trust in Dayshape to support a radical resource management transformation project to drive their plans for growth.

One year after the implementation of Dayshape, MHA highlight the key impacts and benefits made across the firm from a resource management process, strategy, and people perspective.

## The project:

### Replace spreadsheet planning with a fully centralized, scalable resourcing model

Before Dayshape, MHA was using a combination of tools, including spreadsheets, to support resource management. This approach led to inconsistencies in resource plans and lacked real-time data to drive informed decision making. Having rapidly grown over the last five years, MHA wanted to improve resource management at the firm by introducing a more robust and strategic resourcing function to reflect their size, complexity, and ambition for growth.

Leanne Wilkins, Head of Talent Acquisition and Resourcing at MHA, led the transformation project and knew that success would hinge on the introduction of new technology and embracing the consequential process changes that new technology would bring.

Key goals:

- Centralized resourcing model for firm-wide visibility of resource capacity and availability
- Resource management team empowered to make more strategic decisions
- More efficient and robust resource management and budgeting processes
- Quality improvements and tracking measures to deliver the best possible client service
- Greater inclusion and career development via a people-focused resource allocation strategy

## The solution:

### Dayshape as a catalyst for resource management transformation



### The need for an innovative, scalable resource management solution

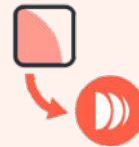
MHA's forward-thinking approach required an innovative solution that could scale and adapt alongside their business. After a thorough tendering process and a peer-to-peer recommendation from an existing Dayshape customer, Dayshape was selected as the software partner of choice.

## Our customer:



MHA is a top 15 UK firm providing accountancy, audit, tax, and business advisory services to enterprises and individuals.

## Results:



Launch of a firm-wide resourcing solution, replacing various tools



Formation of robust, scalable resource management processes



Firm-wide visibility to share resources regionally and nationally

# 2,500

additional resourcing hours of future work found and filled in a single month, highlighting the lack of visibility with previous tools

*"We did look at other large platforms within the resource management space, but these alternatives were not on par with what Dayshape had to offer."*

*"From a user interface perspective, Dayshape really stood out. It's pleasing to the eye and it's intuitive, which is vital as an end user."*

### **The impact:**

**Dayshape empowers the resource management team with firm-wide visibility of resources and work in a unified, strategic resourcing solution**



#### **Resource scheduling efficiency**

### **Challenge: Siloed processes and a lack of overall resource visibility**

Siloed teams and departments meant that resource planning spreadsheets and processes were inconsistent across the business. Disjointed processes and a lack of shared visibility resulted in valuable hours being lost due to the number of people involved in the resource scheduling process.

This also meant opportunities to share resources, optimize utilization, and staff projects more strategically were hidden from view.

*"This process left us reliant on local managers, having granular conversations with people, and unable to see the bigger picture."*

MHA recognized the need to innovate their previous resourcing model to gain greater efficiencies and visibility of overall resource availability at scale.

### **Solution: Firm-wide visibility of resources to support growth and efficient resourcing of projects**

To support a more robust resourcing model, Dayshape's Gantt view provides MHA with a clear, firm-wide view of overall resource availability across their service lines, locations, and business units.

*"To grow at speed, you need visibility of your workforce plan, but the bigger your firm, the harder that becomes."*

### **Benefit: Ability to share resources regionally and nationally**

With a clear view of resource availability and capacity across the business, MHA are now able to efficiently share resources both regionally and nationally.

*"Since using Dayshape the ability to share resources has increased exponentially. Sharing resources regionally has become the norm."*

## **Benefit:** Ability to proactively allocate unassigned future work

Using the visibility and insights provided by Dayshape, MHA's resource management group can proactively allocate unassigned future work to improve the consistency of utilization rates across the firm.

*"In one month, the central resource team filled 2,500 hours by assessing jobs that weren't currently staffed, which is a huge number to find. Would we have been able to do that so effectively had we been without Dayshape and working from spreadsheets? I think that would be highly unlikely."*

## **Benefits:** Strategic insights for data-led decision making

As well as supporting a more efficient resource scheduling process, Dayshape has provided a new lease of life for the resource management team through strategic insights.

*"The insights gained have really supported us from a resource management group point of view. The more that the information is being shared and used, the more informed our conversations become, and the more value we see."*

Greater visibility and the ability to analyse resource management metrics has empowered the resource management team to proactively challenge decision making to drive performance.

*"There was a fear that a firm-wide system would stop conversations from happening but that hasn't happened. Greater visibility has been a catalyst for more valuable strategic conversations, not less."*



## **Powerful reporting insights**

### **Challenge:** Reporting bottlenecks and labor-intensive reporting

Due to limited reporting functionality in one of their previous systems, MHA were unable to easily pull the efforts they needed on their resources and engagement performance. Partners were unable to easily access the information they required, such as forecasted utilization reports, which led to a reliance on resource managers to run and compile reports on their behalf.

*"A major need for us was a more efficient and intuitive reporting system. My biggest bugbear with other enterprise solutions is that the data exists but you need BI skills to be able to extract it."*

### **Solution:** Intuitive, easy-to-use reporting system

To remove bottlenecks and save time for both partners and resource managers, MHA needed a more intuitive reporting system. Dayshape's powerful reporting capabilities enable the firm to easily run, analyze, and share insights across the business.

*“On seeing the reporting system in Dayshape, I knew that the wider team could easily build, analyze, and share reports with no BI specialist required. It was very refreshing to see how easy that was.”*

### **Benefit:** Firm-wide accessibility to in-depth reporting insights

With an intuitive system in place and the wider team able to easily access the reports they need, MHA have developed a more collaborative, informed, and strategic approach to their resource decisions.

*“The wider team can now easily pull their own reports and share them via URL. The easier we can access these insights, the easier they can be used to help us make more informed decisions.”*



### **Predictable engagement performance**

#### **Challenge:** Lack of live engagement performance data

To support a new centralized resourcing model, MHA wanted a solution that could provide a single source of truth to accurately track performance data across their engagements in flight.

#### **Solution:** Real-time engagement economics to drive performance

By integrating with finance and timesheet software, Dayshape’s unique real-time economics shows the impact of resource schedule changes on revenue to accurately predict engagement performance.

Using Dayshape, MHA will have the necessary functionality to plan and predict engagement profitability with accurate data across their live engagements. Real-time engagement financials will support a more productive approach, allowing engagement managers to act sooner and prevent performance heading off track.

*“Engagement economics is another part of the system that really sets Dayshape apart from competitors. I could see how dynamic it was and how quickly we’d be able to see which jobs are tracking to be profitable and which aren’t. Having that visibility to inform strategic resourcing decisions will have a huge impact.”*



### **People-focused resource management initiatives**

#### **Challenge:** Lack of visibility to achieve consistent utilization across the firm

A key priority for MHA was to gain greater visibility and control over resource utilization across the firm. The aim was to achieve a more consistent utilisation rate between locations and offices to balance workloads and reduce the risk of burnout.

*“Increasing utilization targets across the firm was not our sole aim, what we wanted was consistency of utilization.”*

### **Solution:** Reliable, firm-wide resource utilization data

Dayshape's utilization filters and heatmaps help MHA to visualize and assess staff availability and utilization across the firm. Greater visibility allows them to identify and resolve capacity issues sooner to proactively prevent burnout and keep utilization consistent. With a data-driven approach to resource utilization, MHA can optimize their workforce, promote better employee satisfaction, and maximize billable capacity simultaneously.

*"Retrospective utilization data is not enough. We needed the ability to forecast future utilization to actively predict and address pockets where there is known capacity and over utilization. This information is powerful as it helps us protect our people. We have better visibility and control over this with Dayshape."*

### **Challenge:** Aligning resource allocation with career development opportunities at scale

A lack of overall visibility of individual skills, experience, and work preferences often led to the same people being selected for the same projects. To promote greater inclusion and career development for their people, MHA wanted to put a fairer, more robust, and scalable resource allocation process in place.

*"To develop your people, you must give them access to a broad range of work. By aligning resource allocation with individual work preferences, we can offer better career development opportunities."*

### **Solution:** Investing in future career growth with skills-based scheduling

To develop their people and support diversity within the resource allocation process, MHA will take a new skills-based approach to resource scheduling with Dayshape. By consolidating certifications, previous experience, skills, and job preference data into Dayshape as the new system of record, MHA will be investing in the growth of their people as part of their ongoing people-focused strategy.

*"People are being given opportunities to work on things that they never would have had access to before."*

*"I really like the traits, having that centralized knowledge hub within the system is hugely beneficial. The bigger your firm, and the more complex your engagements, the more useful that becomes."*

MHA also plan to use this information to inform and forecast future development and hiring needs as part of their ongoing resource management transformation.

*"The next step for us is to use this information to inform training needs analysis and forward plan on the skills we need to develop or acquire. The ability to analyze and present our trait data allows us to plan proactively and put a case together for the board."*



## Change management

### Challenge: Firm-wide adoption of new software

The move from their previous system and processes to Dayshape was a significant change management undertaking for the firm. MHA acknowledged the switch to using a new system and firm-wide planner may feel daunting to their people. Changing attitudes and ingrained behaviours would therefore require careful consideration to ensure a successful firm-wide adoption of the new software.

*“By talking to the different partners and managers in each of the offices, I gathered many of them were concerned they may not have as much control over selecting their teams.”*

### Solution: Highly configurable workflows and permissions

With Dayshape, resource managers can build their plans by selecting flexible or specific resources. Flexible resourcing considers factors such as resource availability, skills, grade, location, and experience to provide an overall suitability score. However, specific resources can also be selected for jobs for continuity purposes.

Supported by highly configurable workflows and permission settings, MHA worked with Dayshape to tailor their set up to ensure the necessary controls and flexibilities were in place to build confidence in the system.

*“We know that Dayshape has robust but flexible permissions so we could easily alleviate any fears within the wider team. The key was to demonstrate how the change would solve people’s problems.”*

Support for Dayshape at partner level also helped to support change management and adoption at MHA as Leanne explains, *“We’ve had huge top-down support from day one, the partners have been thoroughly supportive of the project and driving the change to get the wider team on board. They particularly like the visibility and the reporting.”*

### Solution: Regular, transparent communication between teams

Key to firm-wide adoption and optimal configuration of Dayshape would be a close collaboration between MHA and the Dayshape team. With regular, transparent communication, Dayshape worked with the internal team to problem solve and engage the right roles at each stage of the implementation process.

*“The implementation of Dayshape went smoothly. We made sure we had someone from every office involved in each stage of the process from requirements gathering, all the way through to our Dayshape go-live date. This was supported by Dayshape with regular, solution-focused, communication to aid the transition.”*

## Benefit: Dedicated customer success representative

To support continued learning and improvements for MHA post implementation, a dedicated customer success representative works in collaboration with the firm on an ongoing basis. This partnership is focused on driving continuous improvement through training and making any adjustments to provide the best results and user experience for the firm.

*"Dayshape is a brilliant supplier, I really appreciate that our Customer Success Manager is not a salesperson – as is the case with a lot of software providers. My advice to others considering a similar project would be to go for a supplier like Dayshape, where their pricing structure is flat and their motivation for helping you is genuine."*

*"As much as I want to keep Dayshape to ourselves, I've already recommended Dayshape to a couple of non-UK firms."*

The next stop on their resource management transformation journey?

*"From a Dayshape point of view, we'll be looking at the next phase of our resource management transformation. With full integration with CCH, we'll be able to use engagement economics to optimize clash resolution. We'll also gain deeper insights into predicted recoverability to evaluate resource allocation and client projects from a profitability perspective."*

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