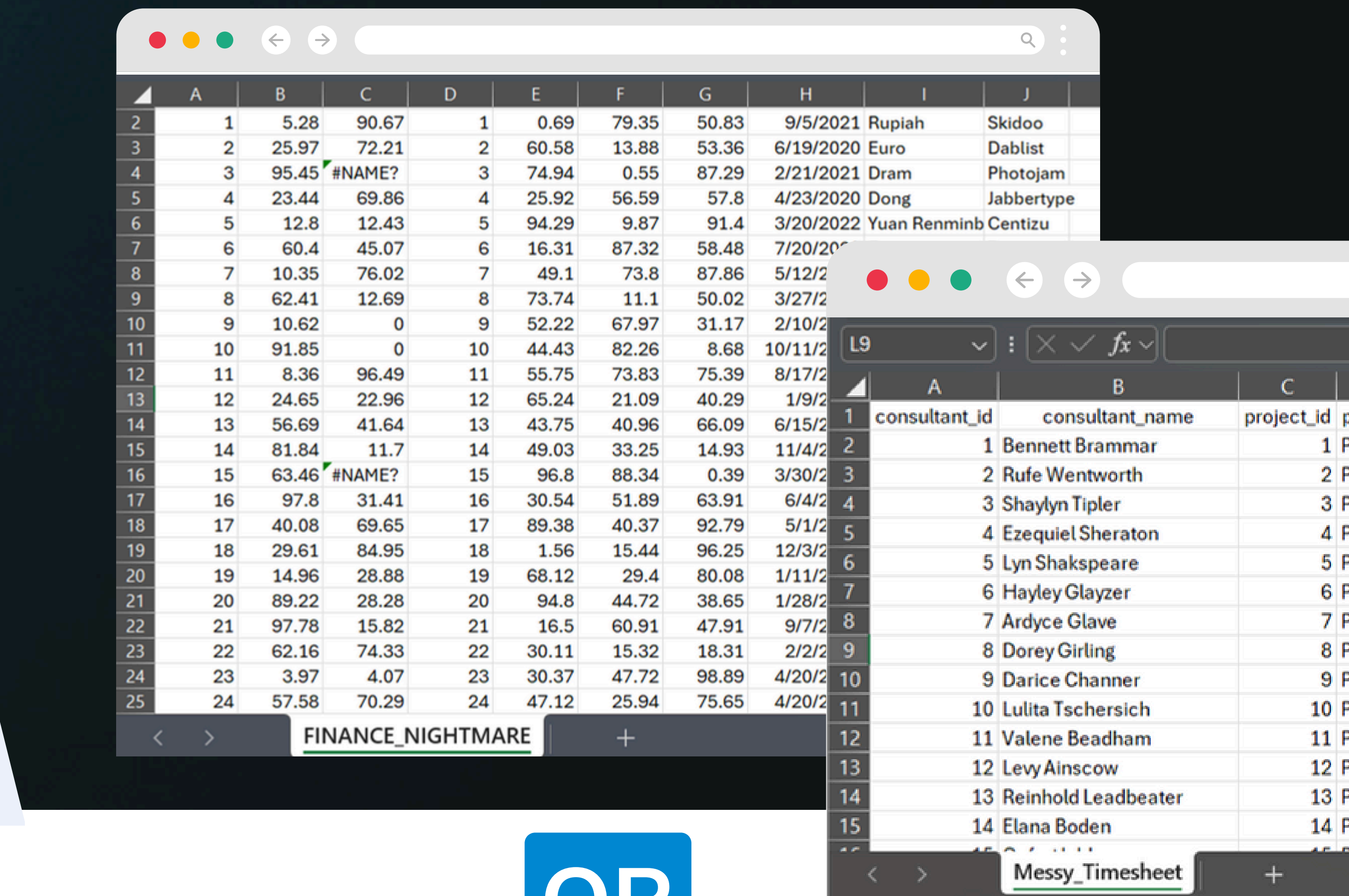# Running a firm on spreadsheets?

Step-by-step guide on how to manage resources, forecast scenarios and track project profitability on spreadsheets and CMap.

Our guide

Here are two options to help your firm **save time**, **increase profit** and **boost growth**.

We offer you two ways to solve your pain:

Option one: a step-by-step manual process on spreadsheets.

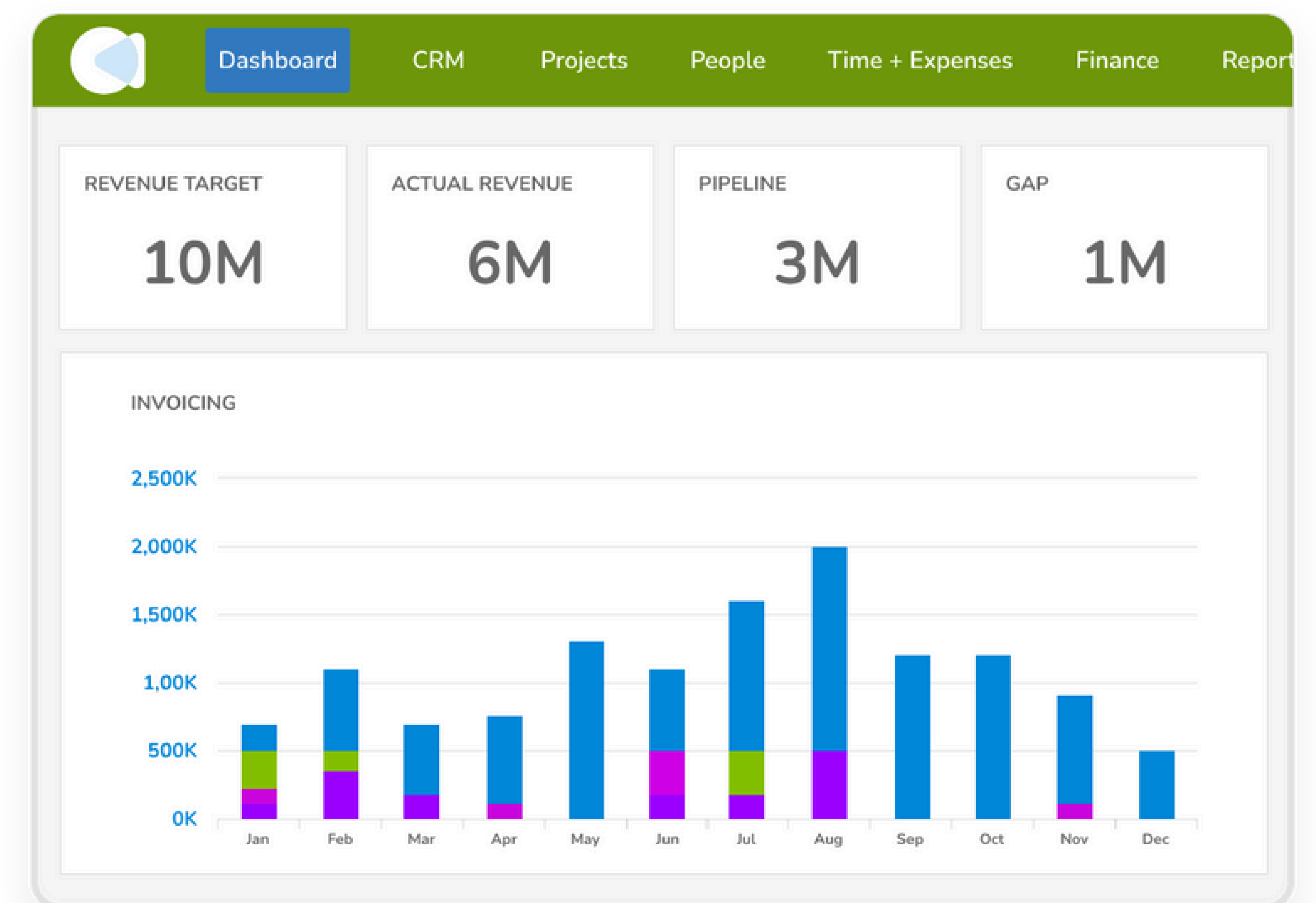**Option two:** using CMap, an easy-to-use software built for consulting firms.

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Keep on top of staff availability...

To set and track your staff availability and efficiently manage resources, these are the steps to follow on your spreadsheets:
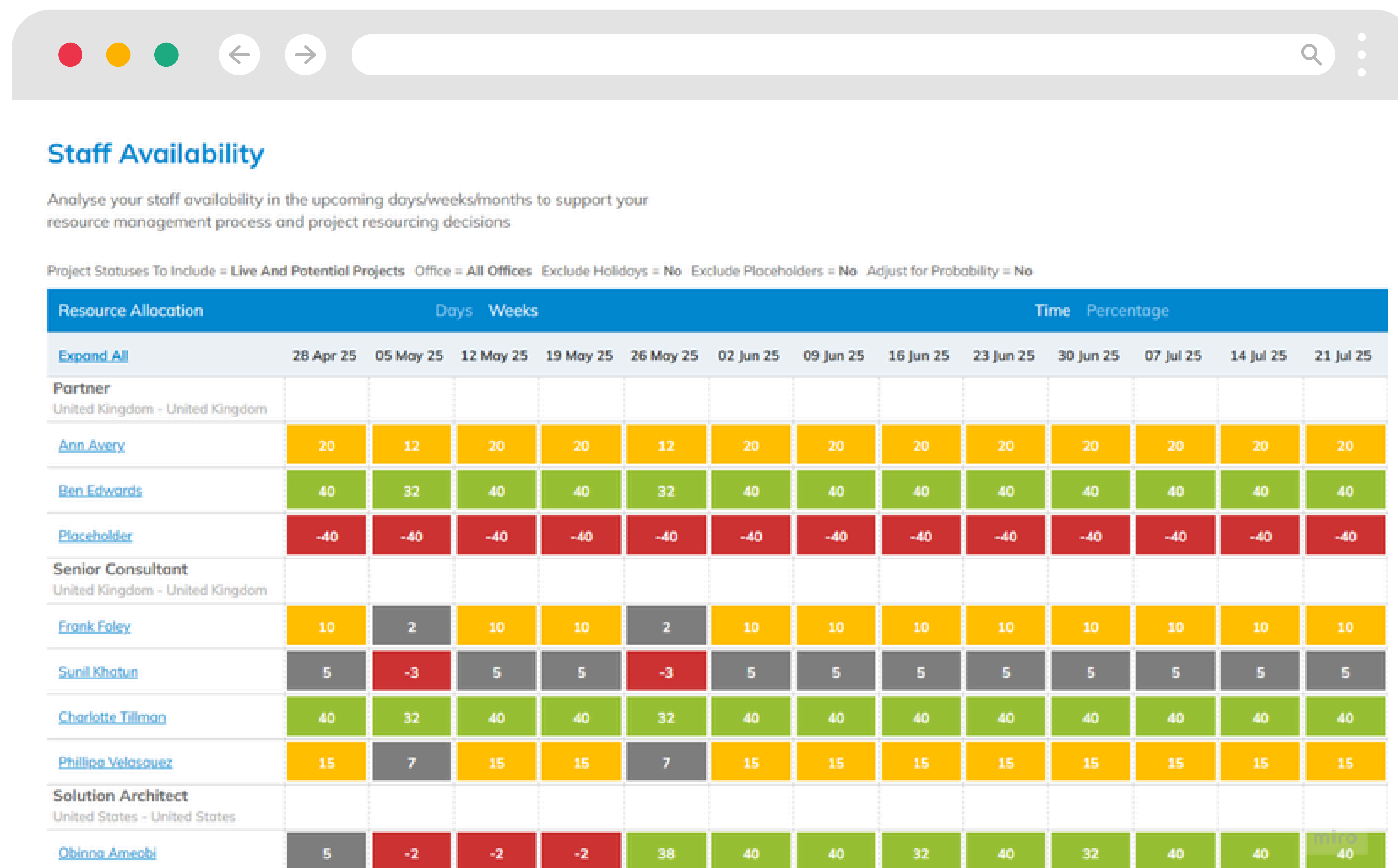
1. Begin by forecasting pipeline and live projects in one view
2. Track billable and non-billable activities
3. Get your people to track time, so the data flows in real-time (at least weekly!)
4. With this, you can create a visualization to highlight who is on the bench, near capacity, or at risk of burn-out
5. Then, create a skills matrix so you can find the best person for the job
6. Bonus points: fill in vacation, away days & public holidays in the schedules

...or take care of it in one click

You can use CMap and do all of this in one place, in real-time, at the click of a button.

Staff Availability

Analyse your staff availability in the upcoming days/weeks/months to support your resource management process and project resourcing decisions

Project Statuses To Include = **Live And Potential Projects** Office = **All Offices** Exclude Holidays = **No** Exclude Placeholders = **No** Adjust for Probability = **No**

Resource Allocation		Days Weeks						Time Percentage						
Expand All	28 Apr 25	05 May 25	12 May 25	19 May 25	26 May 25	02 Jun 25	09 Jun 25	16 Jun 25	23 Jun 25	30 Jun 25	07 Jul 25	14 Jul 25	21 Jul 25
Partner United Kingdom - United Kingdom													
Ann Avery	20	12	20	20	12	20	20	20	20	20	20	20	20
Ben Edwards	40	32	40	40	32	40	40	40	40	40	40	40	40
Placeholder	-40	-40	-40	-40	-40	-40	-40	-40	-40	-40	-40	-40	-40
Senior Consultant United Kingdom - United Kingdom													
Frank Foley	10	2	10	10	2	10	10	10	10	10	10	10	10
Sunil Khatun	5	-3	5	5	-3	5	5	5	5	5	5	5	5
Charlotte Tillman	40	32	40	40	32	40	40	40	40	40	40	40	40
Phillipa Velasquez	15	7	15	15	7	15	15	15	15	15	15	15	15
Solution Architect United States - United States													
Obinna Ameobi	5	-2	-2	-2	38	40	40	32	40	32	40	40	40

Create a range of scenario plans...

If you're looking to track your team's capacity and manage pipeline forecast resourcing on spreadsheets, follow these six steps:

1. Break down each team's capacity by month over c. 12 months
2. Forecast client & pipeline demand by role against the same timeframes
3. Identify the peaks & troughs in demand vs. capacity based on different scenarios
4. Highlight specific roles who will be over or under capacity (this is great data for recruitment)
5. Spot where sales & new business should focus on pipeline
6. Run this weekly - monthly for the strongest view on hiring and business development
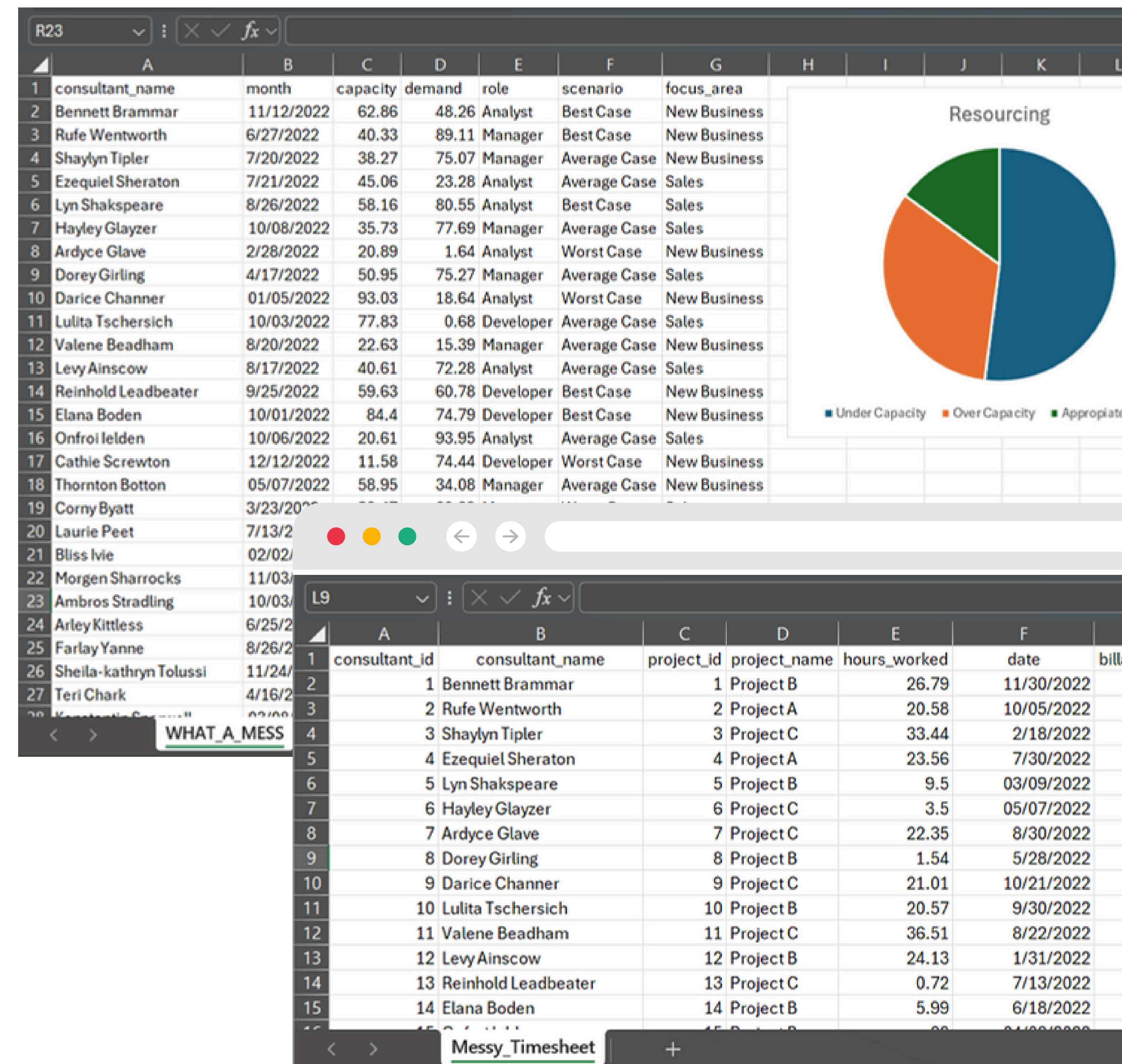
...or combine all of the data you need and run scenarios in seconds

With CMap, you can see live and potential projects in real-time, as well as your staff capacity and demand, with just the click of a button.

Staffing Prediction Report (based on Stage Dates)

Ensure you are making the right resourcing and hiring decisions by assessing your current staffing capacity against your upcoming monthly demand profile. Note: Calculated from Budgeted Hours in Fee Estimator spread evenly between stage dates.

Project Statuses To Include = **Live And Potential Projects** Office = **All Offices** Ignore Time Off = **No** Adjust for Productivity = **No**

Legend: Demand - Pipeline, Demand - Live Projects, Capacity, Demand - Total

			Apr		May		Jun		Jul		Aug	
FTEs Days Hours			Capacity	Demand	Capacity	Demand	Capacity	Demand	Capacity	Demand	Capacity	Demand
Office	Business Unit	Role										
United Kingdom	United Kingdom	Partner	2.00	1.61	2.00	2.01	2.00	1.76	2.00	1.29	2.00	1.47
United Kingdom	United Kingdom	Senior Consultant	4.00	5.89	4.00	8.68	4.00	5.60	4.00	3.27	4.00	3.63
United Kingdom	United Kingdom	Consultant	7.00	8.51	7.00	12.89	7.00	8.46	7.00	4.79	7.00	5.36
United Kingdom	United Kingdom	Data Analyst	5.00	3.21	5.00	4.23	5.00	3.11	5.00	2.76	5.00	0.05
United States	United States	Solution Architect	5.00	5.58	5.00	4.83	5.00	5.26	5.00	4.32	5.00	0.07

Want to see how to plan scenarios in seconds?

LIVE DEMO
Scenario planning & Hiring Strategy

Staff Availability

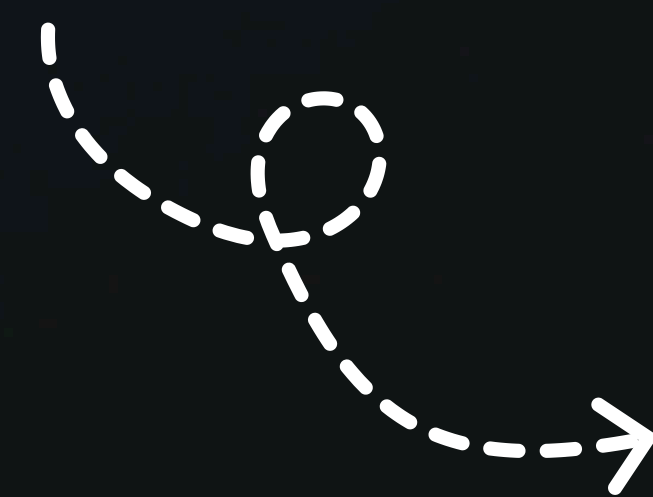**Watch the live demo**

Still here?

Keep reading to learn more about setting up your spreadsheets...

...or just book a CMap demo and save yourself the trouble!
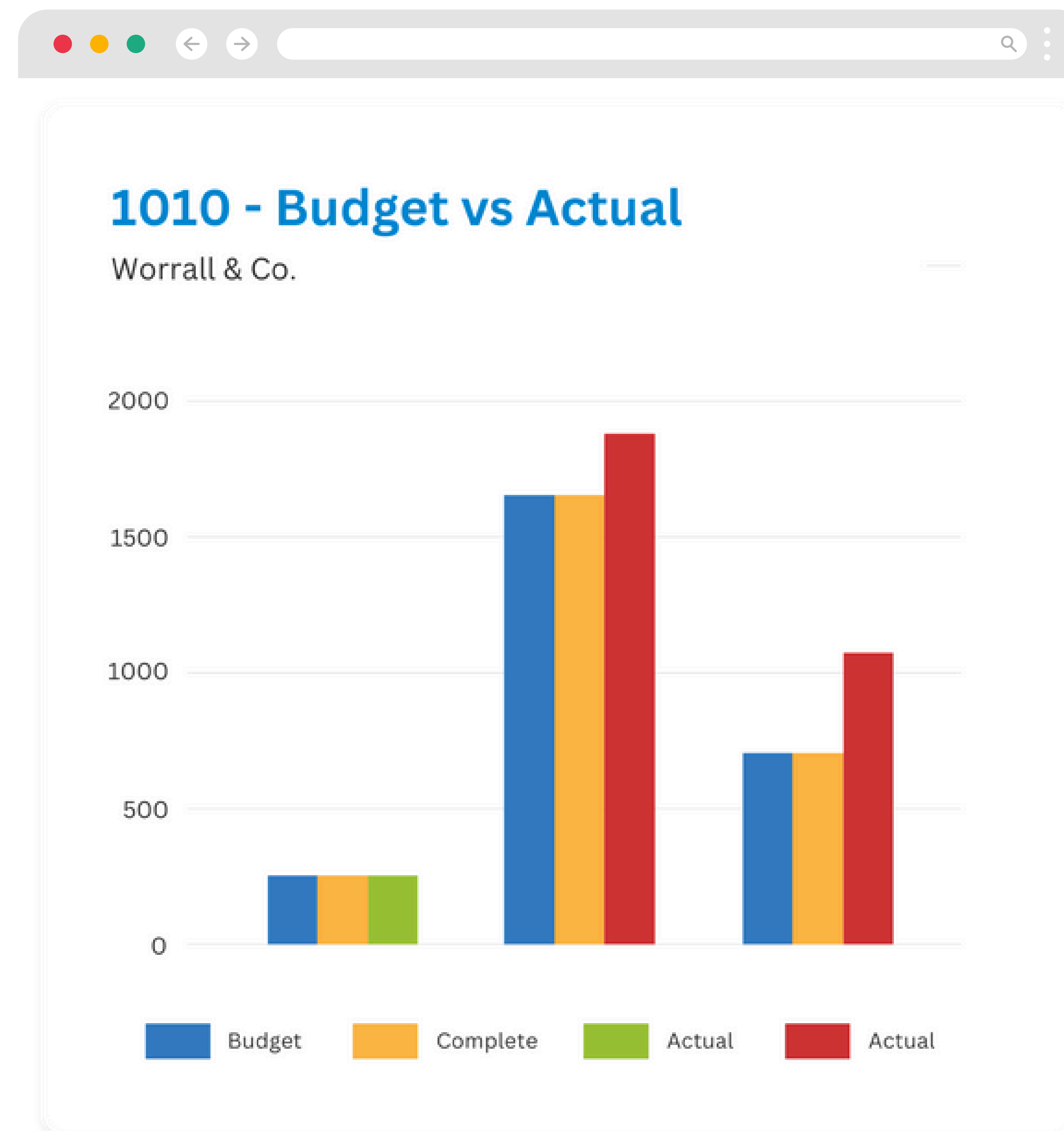
Ditch spreadsheets

9 steps to accurately assess client and project profitability...

Here are the manual steps you need to follow to get full visibility of ongoing and future projects:

1. For each client and project, start by breaking down what was in the SOW - e.g. deliverables, projected time, people cost & charge rates, any rate-cards & discounts used, commercial model (fixed fee, T&M, retainer etc).
2. Then, plan your resource requirements by role or person for the project
3. After that, plan your invoicing schedule & revenue recognition
4. Once live, have all time tracked against the client & project
5. Then, start evaluating where scope creep or over-delivery is coming in based on that time used vs. projections & budget
6. Raise change orders or new SOWs if there is scope creep, extensions, etc.
7. Highlight projects with strong or weak margins internally to inform future pricing & productization strategies - plus, this will help sales & delivery improve with valuable data
8. Ensure invoices are being sent whenever a milestone or date is hit to improve cashflow
9. At project close, review client, project & individual performance

...or get this instantly in real-time

You guessed it - just use CMap! Client margin tracking is visible in real-time on every project

Practical insight

How did Bioregional ditch spreadsheets to improve their resourcing?

In 2024, Bioregional decided to implement CMap's PSA solution for Consulting Firms, bringing their resourcing, project financials, reporting, and more into one system.

For Tom, one of the highlights of CMap was visibility over the individual project history attached to each user. This showed the areas where each consultant was building experience, which was "massively beneficial" for resourcing future projects.

One of the most significant benefits of CMap for Bioregional was the amount of time saved; the company has now been able to move to a nine-day fortnight.
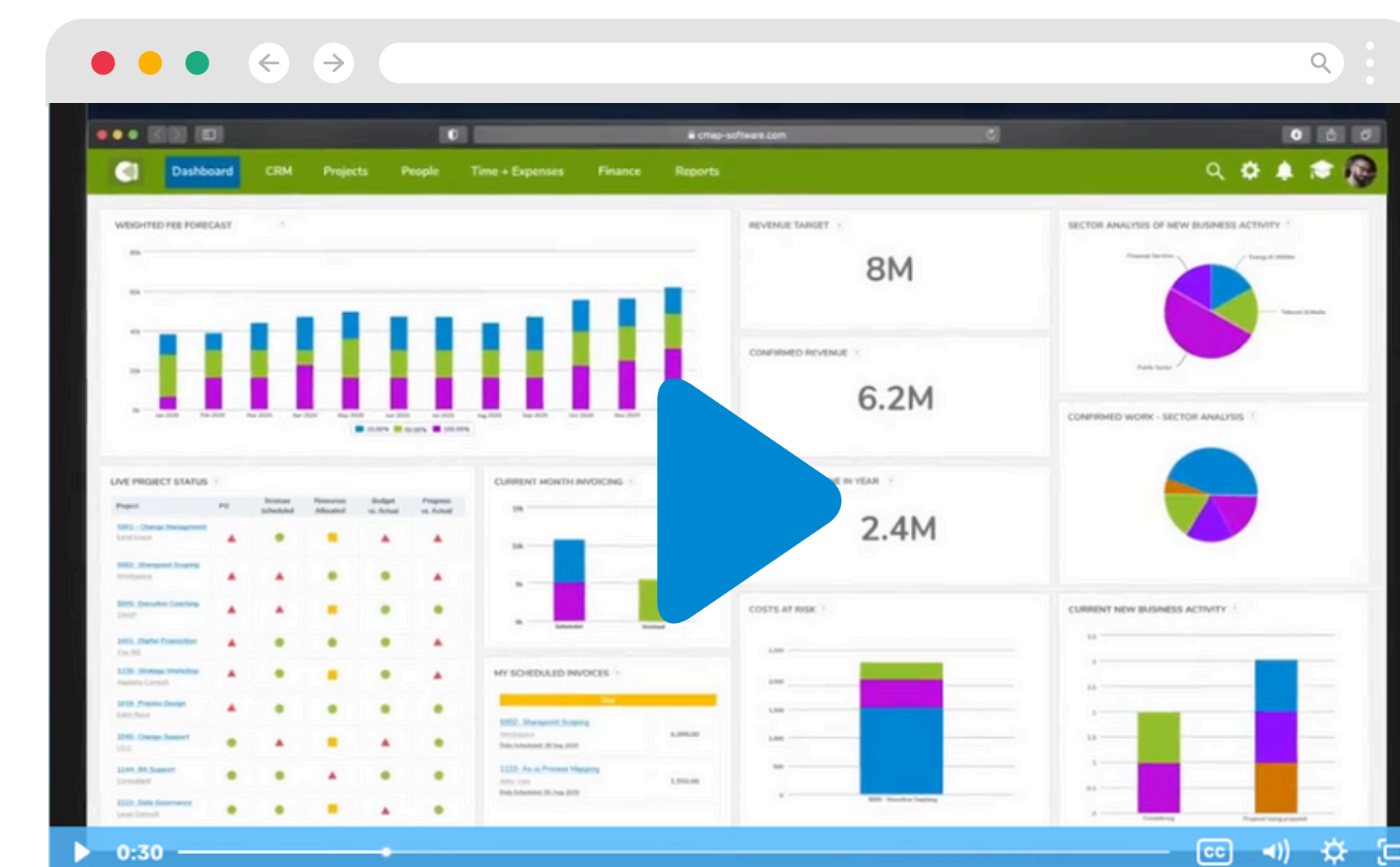
+13%
income per FTE

+50%
net margin

+20%
operating profit

Tom Schuurman | Director of Finance & Resources

Bioregional

Hear from a consultancy who moved from manual to masterful.

Watch the full success story

11

Tactical insight

Listen to our podcast with SBR Consulting on the power of predictable pipelines

It's easy to say firms need to better manage pipeline to accurately scenario plan... but not many have perfected the art of forecasting, deal reviews, and managing opportunities.

We talked to SBR Consulting, experts in sales & business development, to give other consulting firms the insight needed to turn pipeline management from a pipedream to a reality ... and enable your scenario planning to be accurate and realistic.

Juliet Hall | Alan Morton

SBRConsulting

Listen Here

Be honest

Would you advise another firm to
run on spreadsheets?

Switch to CMap.

One platform. Total visibility. Zero spreadsheets.

Ditch spreadsheets