

Key Activities	Growth	MATURITY LEVEL	Operations	Success Metrics
	Revenue Efficiency		Firm Margins	
ABM Process High quota account owners	LTV / CAC	4	Sales & Marketing Costs	Operating Profit
	Team Selling		Delivery Margins	
Growth Comp Plans Brag Sheets Unsolicited Proposals	CAGR	3	Resource Costing Practice Margins	Gross Margin & Project Margin
	Repeatable Growth		Visibility	
Integrated CRM AI-led Funnel Growth Resource planning / hiring	Pipeline Growth	2	Resource Management Project Projections Hiring Plans	Utilization
	Efficient Proposals		Lean Admin	
Proposal CMS Design-led Templates AI Drafted proposals	Hours / Proposal & Win Rate	1	Timesheets Expenses PTO/Leave Invoices Closed books	Admin as a Percent of rev

# Consulting Firm Maturity Model



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## Months 0-3

You get the fundamentals working

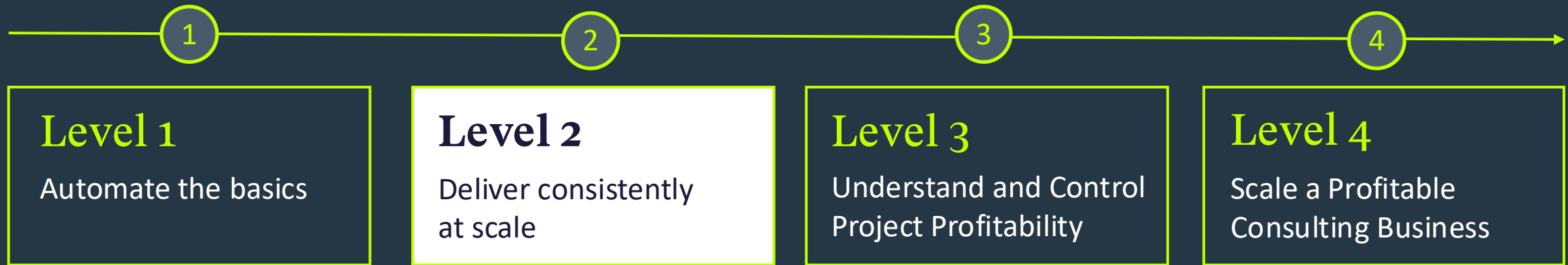
Team is independent in day-to-day usage

Beginning to explore optional features like resourcing / forecasting

First signs of meaningful data flowing through the system

- Timesheets
- Expenses
- PTO/Leave
- Invoices
- Closed books
- Proposal CMS
- Design-led Templates
- AI Drafted proposals

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## Months 3-6

You start using Projectworks to truly run your business

Projectworks is embedded in daily operations  
All core functions of the business are now running inside Projectworks  
Retrospective and forward-looking reporting available

- Resource Management
- Project Projections
- Hiring Plans
- Integrated CRM
- AI-led Funnel Growth
- Resource planning and hiring

# Consulting Firm Maturity Model



## Months 6-9

You now have insights into the unique metrics driving your goals

Projectworks is now established and metrics are using in day to day operations

Company metrics are measured through Projectworks

Reporting is established and rolled out to be used across leadership

- Resource Costing
- Margins
- Growth Comp Plans
- Brag Sheets

# Consulting Firm Maturity Model



## Months 9-12

You have an optimised, data-driven, strategic use of Projectworks to drive your growth

Projectworks is mission-critical  
Advanced reporting used regularly  
Minimal manual workarounds  
Strong feature adoption across departments

- Sales & Marketing Costs
- Operating Profit
- LTV / CAC
- Gross Margin & Project Margin