



Consulting Firm Maturity Model



Foundations

Months 0-3

You get the fundamentals working

Embedded

Months 3-6

You start using Projectworks to truly run your business

Insights

Months 6-9

You now have insights into the unique metrics driving your goals

Optimised

Months 9-12

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

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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

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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

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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