



2025 RESOURCE MANAGEMENT GLOBAL SYMPOSIUM

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Beyond Services: Expanding Resource Management Principles into New Business Functions

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Katy Mabbitt

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 Docusign

Accidentally began my career in Resource Management in 2005 when I not-so-gently implied at a Director dinner that having 15 managers negotiate each and every consulting assignment was not exactly efficient.

I was the first Resource Manager at CIBER, Inc by then end of that dinner.

CIBER, Inc	2005-2017
Infor (CIBER acquisition)	2017-2020
Amazon Web Services	2020-2022
Docusign – ProServe	2022-2024
DMI	2024
Docusign – Customer Success	2024-2025



Eric Mannweiler

Senior Resource Manager
DocuSign

- Worked in Inventory Control for 8 years
- Moved to Resource Management in 2018, at Ciber/Infor
 - Inventory Control = Resource Management
(high-five for this Session's theme)
- Moved to DocuSign in 2022
- For 7 years, I staffed the more complex/cutting-edge/high stakes product teams.
- "I staff Prof. Services. I'm going to staff Prof. Services forever!"
- Started staffing Sales in 2023

Agenda

- 1** The Portability of Resource Management Strategies
- 2** The Docusign Before Times: Where Did We Start?
- 3** The Turning Point: Our Road to Change
- 4** Still Evolving: What's next?
- 5** Making the Case: Bringing RM Beyond Services
- 6** Q&A

The Portability of Resource Management Strategies

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Selecting the most appropriate resource(s) necessary to perform a given task(s) with a desired outcome, and deploying those same resources in the most efficient manner possible

Source: Resource Management Institute

Right Person



Right Place



Right Time

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- Allocating headcount to strategic initiatives
- Identifying skills gaps and planning how to fill them
- Balancing time across conflicting priorities
- Matching people's strengths to business needs
- Planning who works on what, and when
- Prioritizing limited resource during crunch times
- Shifting workloads based on changing business needs
- Filling gaps when someone's out unexpectedly

Who Are We and What do We Do for Docusign

Customer Success Account Assignment Team / CSAAT

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Right Person

- Skills Assessment
- Vertical Focus
- Current Level & Professional Trajectory
- Region
- Language



Right Place

- Point of sale - Triggered by License Sale
- Team alignment - Relationship to Account Executives
- Relationship building is as important as selling



Right Time

- Book of Business Size = Capacity
- Quota, compensation, & Targeting
- Compensation and Targeting
- Signed Contract
- Customer Contract Terms (1yr, 2yr, 3yr)
- Target is retaining the customer

The Docusign Before Times: Where did we start?



- Assignment decisions were manager-driven and inconsistent
- Regional Ops stepped in without a formal global process
- Decisions were made live in conference rooms – whoever showed up got “dibs”
- Everyone dreaded annual re-assignment planning
- Managers and Ops had full plates—assignments were a side task no one had time for
- Stakeholders were burned out on the process
- The business was held back by not having a team dedicated to managing assignments

“We all hated it.”

The Turning Point – Our Road to Change

🔑 **Trust Was the Foundation**

Stakeholders were ready for change—we just had to build trust

🌍 **Started with Regional Ops – North America first then expanded around the globe**

Partnered deeply to understand their pain and build solutions. Built credibility one region at a time

🔧 **Knowledge Transfer = Heavy Lift**

60-90 days of shadowing, enablement and documentation. Years of know-how lived only in people's heads —turning tacit knowledge into a system

📖 **Learning the Language**

We became fluent in the language of Customer Success. “Book of Business,” “Renewal,” “AE,” “CSAM” —we built shared vocabulary

🧠 **Understanding the Business**

Who gets assigned to what customer, when, and why? What defines a good assignment? We studied what “good” looks like and used it to create a resource management methodology appropriate to Customer Success.

📊 **Framing Demand and Supply**

We aligned with our cross functional partners in Sales and Territory Ops to define our customers and appropriately allocate them to our Customer Success capacity

Still Evolving: What's next?

Current Position

RM-Mā ā !
q MPO* MBI

- Centralized global resource management function
- Established proactive resource management Practices
- Good visibility into demand, capacity, and allocations
- Standardized processes with appropriate tools; CRM for Customer Success
- Metrics ownership
- Processes documented
- Some KPIs established

Next Steps

Firmly Level 4
Quantitatively Managed

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Future Goal

Achieving Level 5
Optimized

- Automation of resource mapping
- Cross functional alignment with Sales Ops, Territory Ops
- Reliable data across interconnected systems/tools
- Proactive identification and mitigation of process inefficiencies
- Metrics transition from spreadsheets to dashboards

Making the Case: Bringing Resource Management Beyond Services

Start by Observing



Look for chaos, burnout, or “whoever’s available” assignment patterns. That’s your opening

Learn the Business First



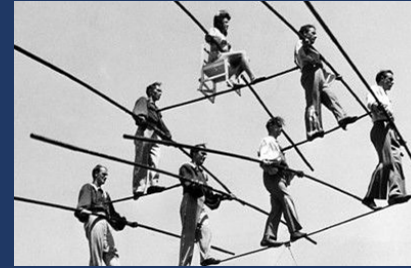
Understand how success is measured in that function. Speak their language before proposing change.

Build Trust, One Partner at a Time



Start small. Find a pain point and a champion. Listen more than you pitch.

Demonstrate RM Value



Show how resource alignment improves outcomes—efficiency, fairness, capacity, clarity.

Scale Thoughtfully



Document wins. Share learnings. Don’t rush. A structured, trusted approach will earn adoption.

Wherever people are doing work, there’s a place for Resource Management.

Questions





2025

RESOURCE
MANAGEMENT
GLOBAL
SYMPOSIUM

LEARN. COLLABORATE. INNOVATE.

Thank You!