



# 2025 RESOURCE MANAGEMENT GLOBAL SYMPOSIUM

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## Driving Efficiency: Fine-Tuning Your RM Processes for Peak Performance

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# **Debra Olson**

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Debra is a Senior Principal Consultant at RTM Consulting and leads many of the projects for RTM's Professional Consulting Services Team.

She leverages her 20+ years of business consulting and management experience to help clients improve their PS operations, global resource management functions and PMOs. Her work includes helping clients to identify process issues and operational inefficiencies that inform the development of recommendations and strategies to drive improvements and help customers meet their targeted objectives.

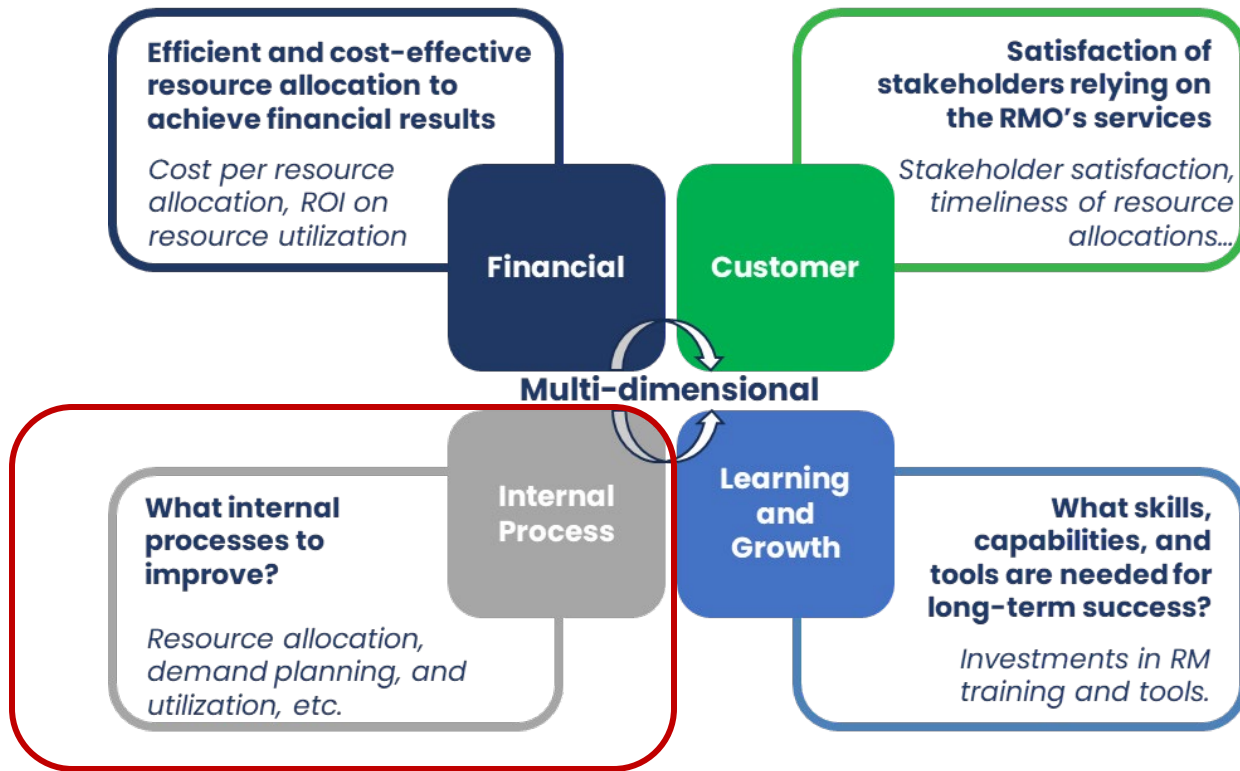
A frequent speaker at RMGS and other RMI events, she holds an MBA from Montclair State University w/an International MBA Certificate from Groupe Ecole Supérieur de Commerce and a BS in Communications from the University of Texas, Austin.

***How can we  
consistently  
demonstrate value  
to the organization***

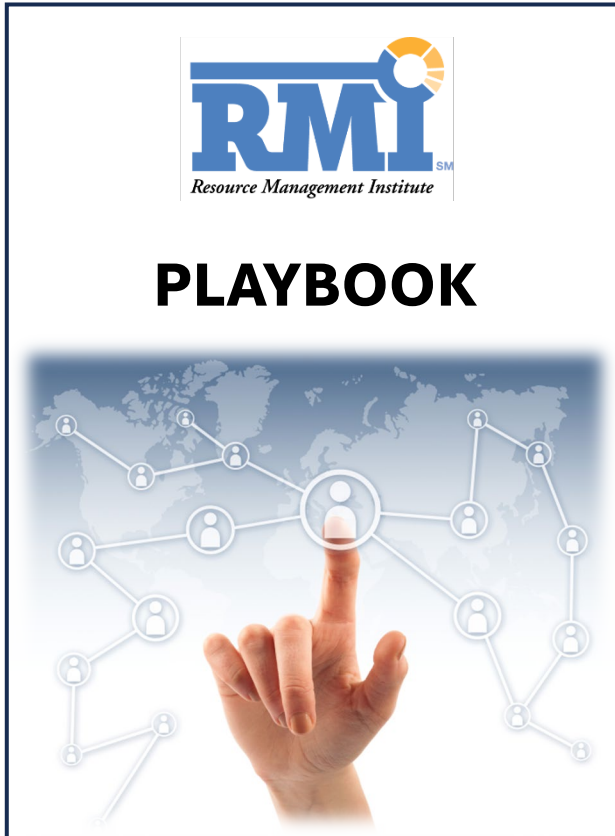


# Processes Makes the RM World Go 'Round

## The Balanced Scorecard



- Processes aren't necessarily the "sexy" part of RM
- **But....** they are the "meat & potatoes of RM"
- Operationalize value through
  - Defining solid processes
  - Continuous Review & Improvement
- Successful processes require regular socialization.



- 01** Secure and cultivate **executive support for RM** and ensure proper organizational positioning
- 02** Build and operate a **Resource Management Office (RMO) with a clear charter**
- 03** Define and adopt an **enterprise Resource Management process with supporting documentation and training**
- 04** **Characterize your supply** with well-defined roles, skills inventory, and profile data managed centrally across the organization
- 05** Use a **proactive staffing process** that balances priorities for project allocations and the need for business efficiency (utilization) with transparent visibility enterprise-wide to all available resources
- 06** Leverage a **robust forecasting and capacity planning** capability to meet the dynamic needs of the business
- 07** Utilize a **sourcing and development strategy** that supports the definition of actions necessary **to align resource supply with forecasted demand**
- 08** **Automate RM processes in best-of-breed technology** that integrates with your technology ecosystem
- 09** Institute a robust **governance framework** to monitor adherence to RM process standards, ensure quality data, and measure RM effectiveness
- 10** Invest in the **ongoing development of Resource Managers**

# **Breaking Down the RMI Playbook**

## Characterize Your Supply

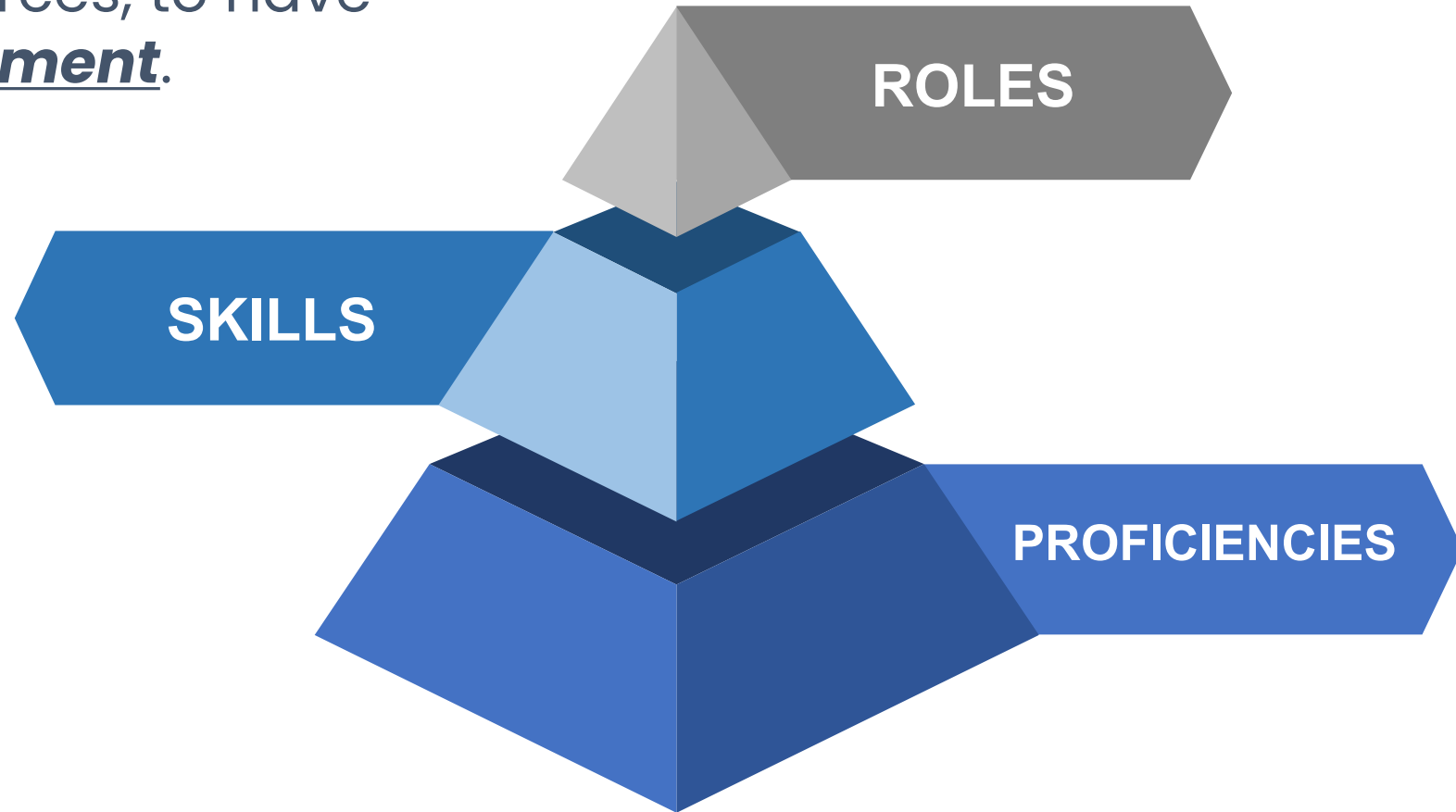
# RMI Play #4 – Supply Management

Characterize your supply  
with well-defined roles, skills  
inventory, and profile data  
managed centrally across  
the organization



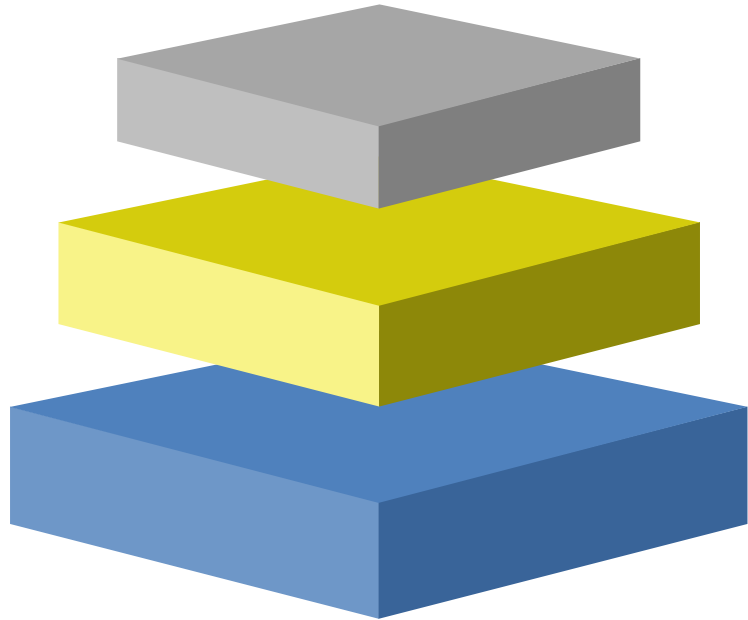
# Key Building Blocks of Supply Management

You need the ability to fully **understand the capabilities** of your resources, to have **effective supply management**.



# Bringing Value with Effective Supply Management

***Having confidence around resource abilities allows you to move past the day-to-day and into strategic planning for future needs.***



## **ACCELERATED STAFFING**

Improves resource identification and speed to staffing.



## **COMPREHENSIVE FORECASTING**

Tying skills to future resource needs creates multi-dimensional searches.



## **NEW CAPABILITY PLANNING/ SKILL DEVELOPMENT**

Can assess how ready the team is to deliver new capabilities and develop training programs to address skills needs.

***Skills Impact Everything!***

# **Breaking Down the RMI Playbook**

## **Proactive Staffing Process**

# RMI Play #5 -- Staffing

Use a **proactive staffing process** that balances priorities for project allocations and the need for business efficiency (utilization) with transparent visibility enterprise-wide to all available resources



# Staffing is a Critical RM Element

Streamlined process that includes access to the most complete set of data

Iterative supply and demand data collection and analysis

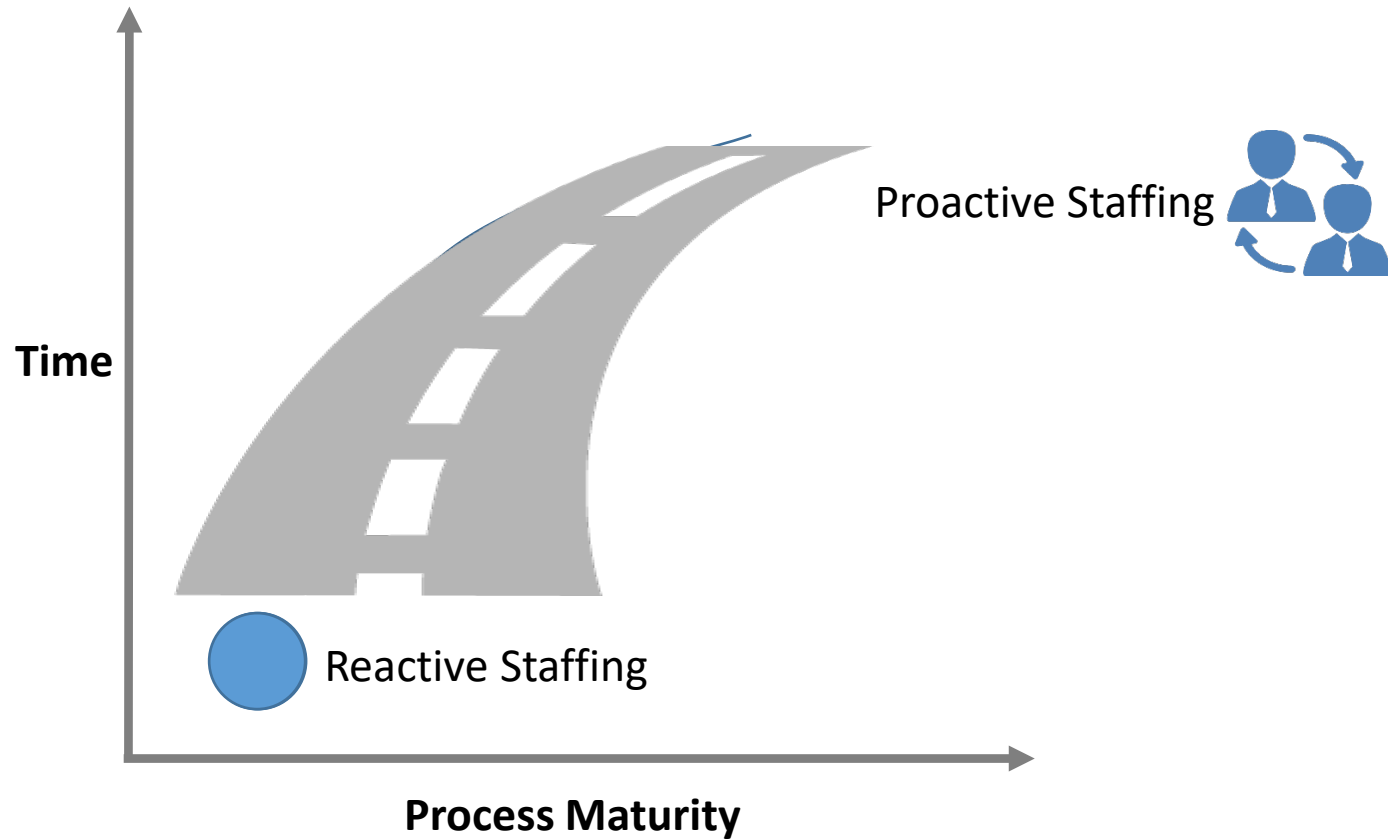
Provides visibility into resource availability

*We all can agree that the lack of access to data is a big part of the challenge RMs face in staffing!*



# Proactive Staffing Creates Value

## Road to Value



## Increased Ability to Demonstrate Value

- Project Priorities
- Improved Utilization
- Resource Visibility
- Project Performance
- Less Chaos!



# **Breaking Down the RMI Playbook**

## **Robust Forecasting Capability**

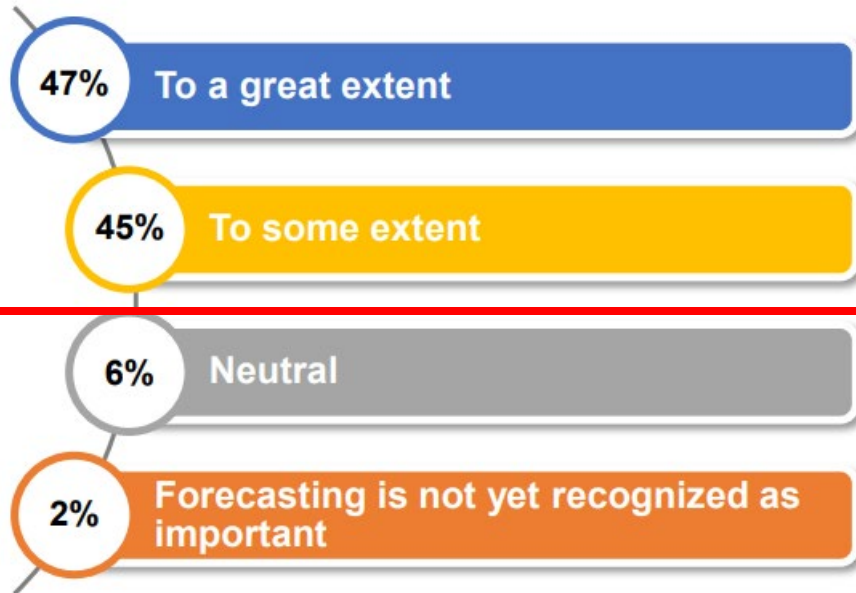
# RMI Play #6 -- Forecasting

Leverage a **robust forecasting and capacity planning capability** to meet the dynamic needs of the business



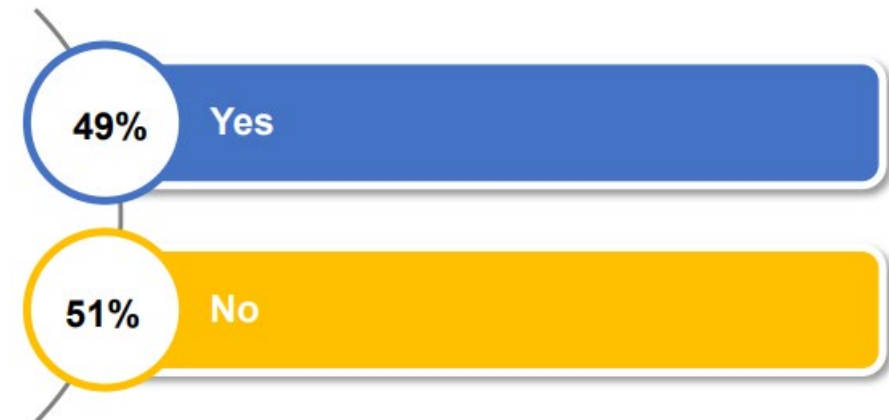
# Forecasting is Important to Organizations

**To what extent does your organization recognize the importance of resource forecasting to support resource planning needs?**



**92% AGREE FORECASTING IS IMPORTANT TO SOME EXTENT**

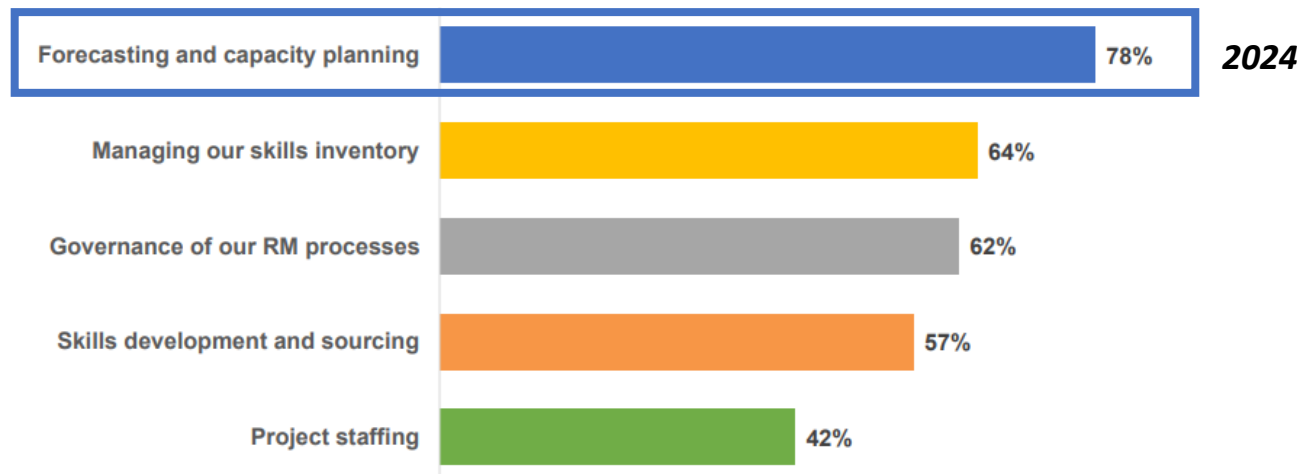
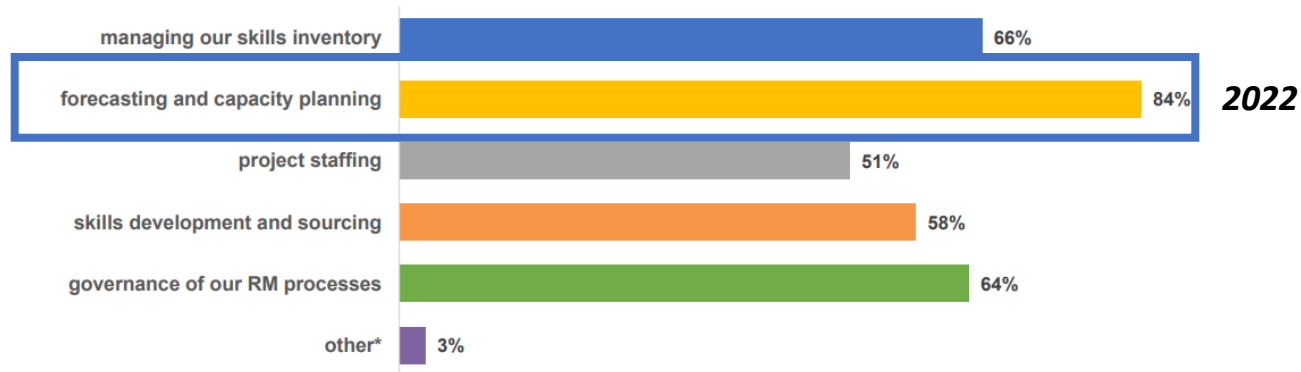
**Does your organization currently have a formalized and documented process for forecasting resource needs?**



**AND YET.....**

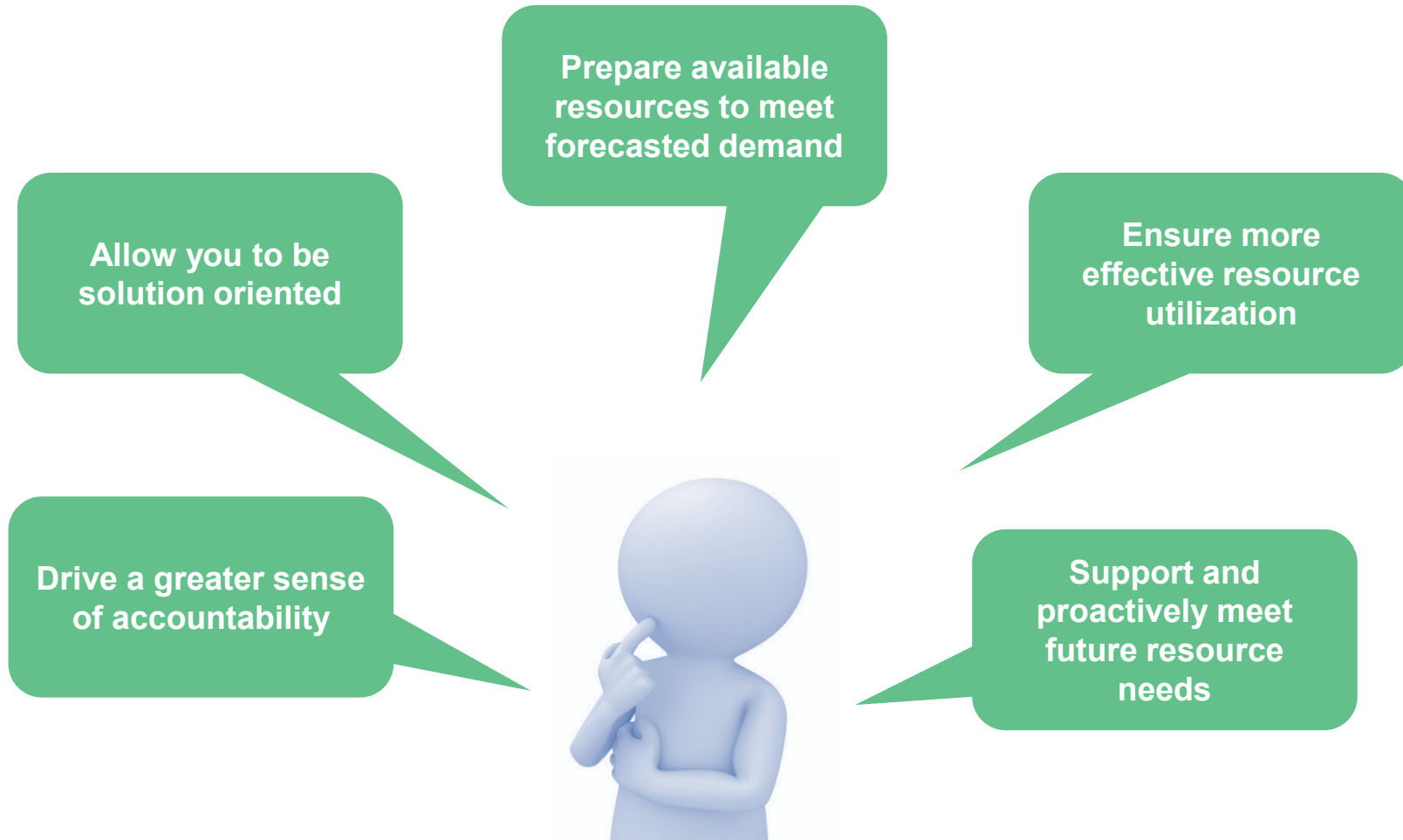
# Forecasting is Still a Source of Struggle

Q10. Regarding process support for resource management, we need/plan to develop better processes for: (Check all that apply)\*



***Forecasting is still the #1 inhibitor to conducting effective RM/WFM operations***

# Why do We Forecast



# So, what is the Strategic Value of a Forecast?



**It allows you to go deeper, analyze the data more completely which leads to more strategic decision making.**

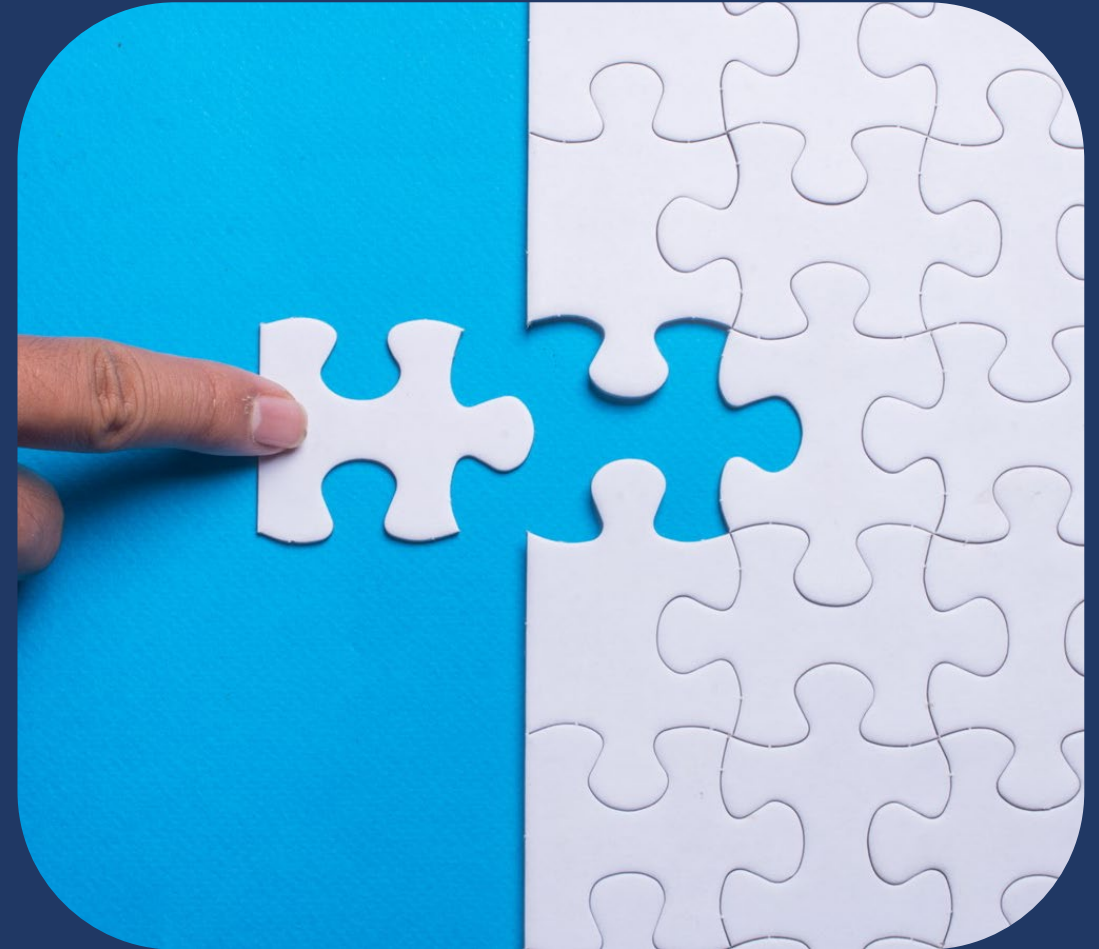
- 01** → What are the demand trends telling you?
- 02** → Are there specific things driving demand -- are you taking that into consideration as you start to plan?
- 03** → Are you seeing certain resource roles or skills that are becoming predominant in requests?
- 04** → Do we have enough capacity to cover our forecasted demand? Do we have the right resources?

# **Breaking Down the RMI Playbook**

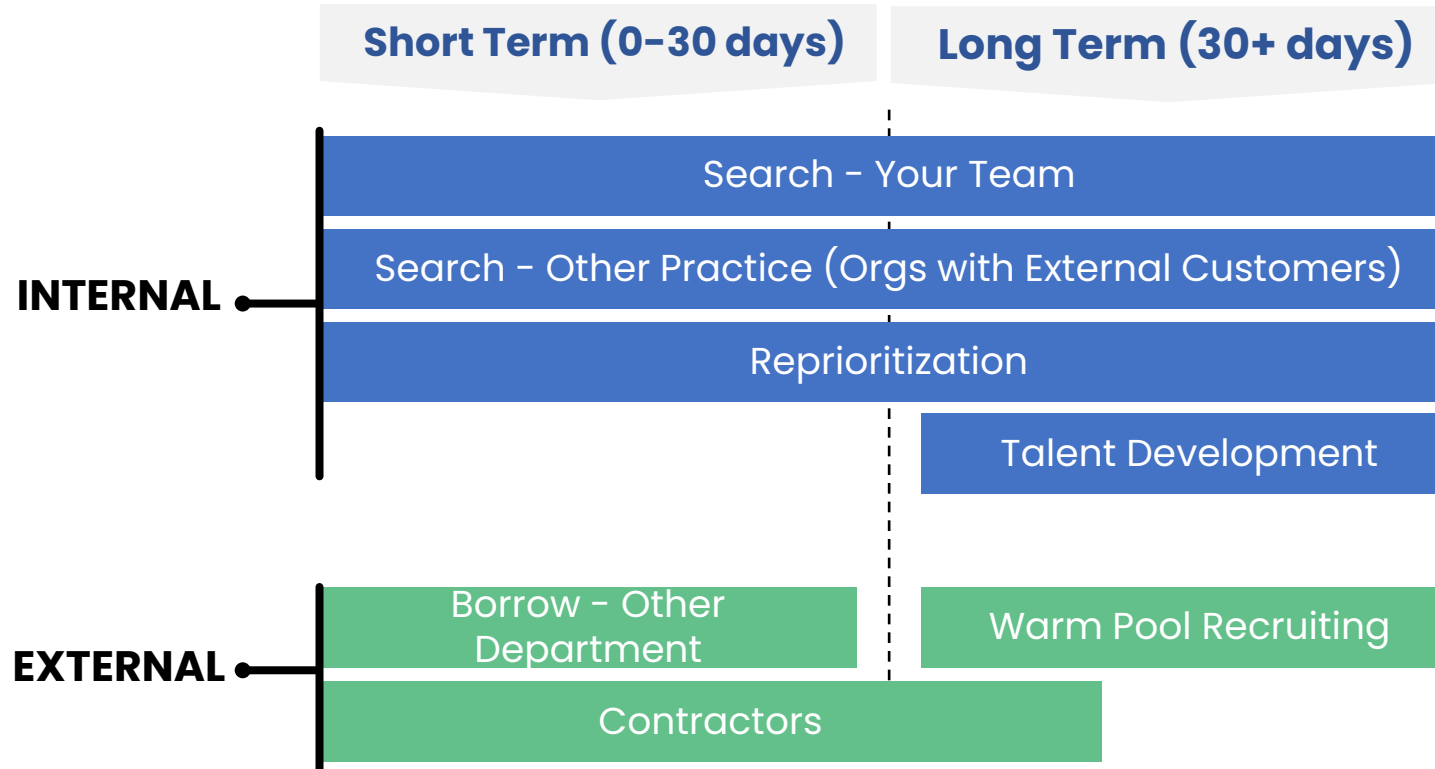
## **Sourcing Strategy**

# RMI Play #7 -- Sourcing

Utilize a **sourcing and development strategy** that supports the definition of actions necessary **to align resource supply with forecasted demand**



# Assessing Your Sourcing and Development Strategy



*Our RMI Survey data shows that organizations are using multiple ways to handle tight resourcing.*

### **Top 3**

*3<sup>rd</sup> Party/contractors – **71%***

*Internal HR Hiring – **47%***

*Offshoring – **41%***

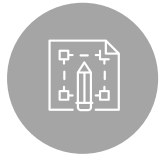
# Tips From the Trenches



***If your sourcing strategy is not taking into account all available avenues then you may miss out potential options***



***Be sure you have established parameters around how you will handle “peak load” resource fluctuations so you can quickly and proactively act.***



***Incorporating skills assessments as you define a training strategy provides a clearer picture of your training and development needs.***



***Don’t underestimate the need for a formal process and regular interlocks with 3<sup>rd</sup> party resource providers.***

# Final Thoughts

- ❖ To operationalize the value of resource management you need continuous review to identify changes when and where they are needed
- ❖ Understand the “why are we doing this” in each process area
- ❖ Review with the lens “how will this process help drive strategic importance

**THE SINGLE BIGGEST PROBLEM IN  
COMMUNICATION IS THE ILLUSION  
THAT IT HAS TAKEN PLACE.**

GEORGE BERNARD SHAW

# Final Thoughts

- ❖ Operational resource management changes will be needed
- ❖ Understanding “this” in each situation
- ❖ Review with process help importance



THE BIGGEST PROBLEM IN  
THE ILLUSION  
OF TAKEN PLACE.

ROBERT SHAW

# Questions





2025

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LEARN. COLLABORATE. INNOVATE.

**Thank You!**