



2025 RESOURCE MANAGEMENT GLOBAL SYMPOSIUM

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RM Skills Development and Planning

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Management – Corporations





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RSM

I have been with RSM for almost 5 years. During my time here I have worked across Capabilities and Markets within Tax and currently support our Tax Corporations Capability. I bring 16 years of Resource Management experience working in both the Big 4 and Middle Market Firms. I have supported Consulting as well as Audit and now Tax. During this time, I have lead teams, helped establish RMO procedures as well as test and implement software for the RMO. I have to say one of the most rewarding parts of my role is being a people leader. I love developing talent and teaching them the day to day of Resource Management. It is a true passion of mine. I have held my RMCP® certification since 2020.

Ice Breaker



If you were given a million dollars to improve resource management in your workplace, what's the most creative and outlandish thing you would do?

Or

If your team was a superhero team, what special resource-related superpower would each member have, and how would you use those powers to conquer your biggest resource challenge?

Agenda

- 1** Know Your Audience
- 2** Problem Solving Vs. People Pleasing
- 3** Difficult Conversations
- 4** Taking this back to the office
- 5** Questions

Know Your Audience



Know Your Audience

Understanding our audience is crucial for effective resource management. It allows us to:

- Allocate resources strategically
- Tailor communication for maximum impact
- Build stronger relationships with stakeholders
- Increase project success rates
- Improve overall resource utilization

Why does Understanding our Audience matter?

Improved Communication – Tailored messaging resonates better:

- It works to reduce misunderstanding and misinterpretations
- Builds trust and rapport

Increased Stakeholder Satisfaction:

- Meeting audience expectations leads to higher satisfaction
- Builds strong relationships and loyalty
- Fosters collaboration and support

Improved Resource Utilization:

- Right resources assigned to the right jobs
- Optimized resource allocation for maximum efficiency
- Reduced waste and increased ROI

Know Your Audience

Let's talk through some techniques that we can use based on research and analysis

Demographics: Location, education, occupation

Psychographics: Interests, values, lifestyle, personality traits

Additionally, we can conduct Stakeholder Interviews:

- Gather insights directly from key stakeholders
- Understand their needs, concerns, and expectations
- Build relationships and establish trust



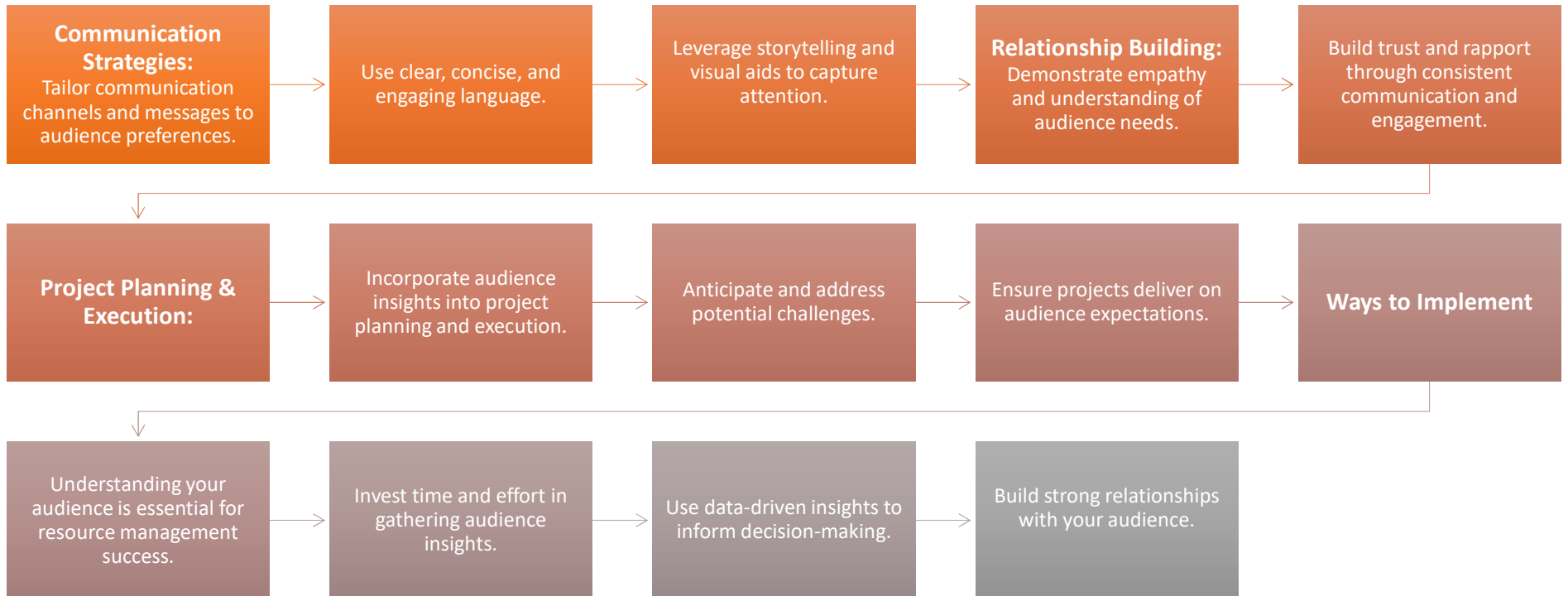
Know Your Audience

HOW to know your audience:

- Take a look at the resources you support
- Set up time to meet with them and get to know them on a professional basis (you would be surprised – you will get to know them on a personal basis this way as well!)
- Take personal notes (ex: Tom enjoys collaborating for problem solving rather than solving it himself)
- Remembering how people like to communicate, and problem solve is essential for future productive discussions



Know Your Audience

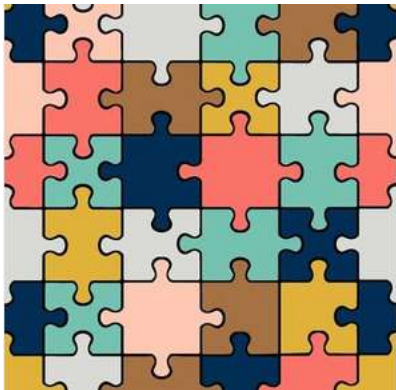


Problem Solving Vs. People Pleasing

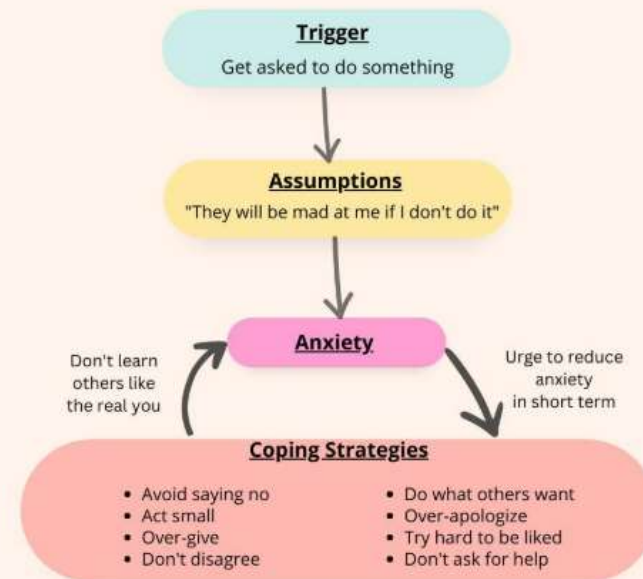
Problem Solving vs. People Pleasing

In resource management, it is imperative we know the difference between problem solving vs people pleasing.

We consistently try to place all the puzzle pieces together while keeping our key stakeholders happy.



The People-Pleasing Cycle



Problem Solving vs. People Pleasing

Practice dialogue: What is an example of problem solving vs. people pleasing?

Problem Solving

Problem Solving

People Pleasing

People Pleasing (not
offering a solution)

Problem Solving

People Pleasing
(even if it means
overloading yourself)

Problem Solving Vs. People Pleasing

Feature	Problem-Solving	People-Pleasing
Focus	Identifying and resolving issues	Gaining approval and avoiding conflict
Motivation	Achieve desired outcomes, improve situations	Fear of rejection, maintain positive relationships
Values	Efficiency, effectiveness, logic	Acceptance, belonging, harmony
Communication Style	Direct, assertive, fact-based	Passive, agreeable, avoids opinions
Decision-Making	Objective, data-driven	Subjective, emotion-driven
Conflict Resolution	Addresses issues directly	Avoids or minimizes conflict
Boundaries	Maintains healthy boundaries	Blurs or eliminates boundaries
Self-Worth	Internal validation	External validation
Outcomes	Tangible results, growth, confidence	Resentment, burnout, loss of self
Resource Management	Efficient allocation, data-driven decisions	Inefficient allocation, emotional decisions

Problem-Solving:

- Centers on identifying and resolving issues
- Prioritizes finding effective solutions
- Emphasizes logic, analysis, and objective evaluation

People-Pleasing:

- Centers on gaining approval and avoiding conflict.
- Prioritizes maintaining harmony and avoiding negative emotions.
- Emphasizes empathy and accommodating others needs

Difficult Conversations



Difficult Conversations

- In resource management, we frequently must have difficult conversations regarding resource allocation, conflict management, and job priorities
- It is essential to know your audience when faced with a challenging conversation (example: does the person react well to solution-based decisions or are they more likely to think outside the box?)

Category	Description/Example
Feedback	Giving or receiving criticism about performance, work quality, or behavior.
Conflict Resolution	Addressing disagreements and disputes between individuals or groups, resolving misunderstandings, and finding common ground.
Boundary Setting	Asserting personal needs and limits, saying "no" to unreasonable requests, and defining acceptable behavior.
Difficult News	Delivering bad news (e.g., layoffs, project cancellations, personal setbacks) or receiving upsetting information (e.g., diagnosis, loss).
Performance Issues	Addressing performance gaps with colleagues or employees, discussing areas for improvement, and setting expectations.

Planning for Difficult Conversations

Choose the right time and place: Find a private, neutral setting

Plan your approach: Define your goals and desired outcomes

Practice active listening: Prepare to listen attentively and empathetically

Focus on "I" statements: Express your feelings and perspectives without blaming

Acknowledge the other person's perspective: Show empathy and understanding

Strategies for Effective Communication

Start with empathy: Validate the other person's feelings.

Use "I" statements: "I feel..." instead of "You always..."

Focus on specific behaviors: Be clear and concrete in your communication.

Ask clarifying questions: Ensure you understand the other person's perspective.

Look for common ground: Identify shared goals and values.

Difficult Conversations

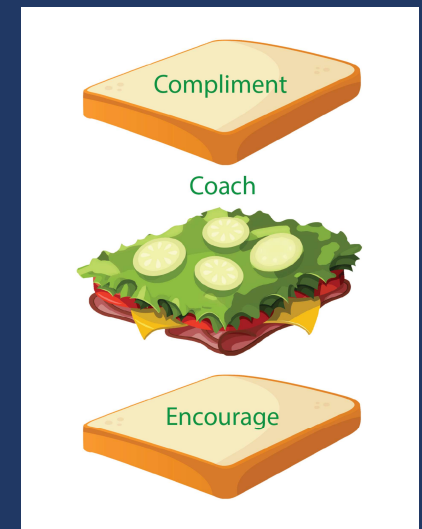
- When faced with a challenging conversation, the compliment sandwich approach can be extremely beneficial
- **What is it?** You start with a compliment, sandwich in the problem at hand, and then end with a compliment/encouragement

Example:

"Hi Dave! You've been doing such an amazing job keeping the team organized. *(Compliment/recognition #1)* I did notice, though, that the latest project timelines were a bit tight, and we might need to improve on that to avoid last-minute stress. *(Sandwiching in the problem)* But overall, I really appreciate your dedication and how you keep everything running smoothly. Thank you! *(Ending with a compliment)*"

Communication Strategy

"The Compliment Sandwich"



Difficult Conversations

Conflict Resolution Techniques:

Mediation: Involving a neutral third party to facilitate communication.

Negotiation: Finding mutually agreeable solutions through compromise.

Active Listening: Paying full attention to the other person's perspective.

Finding Common Ground: Identifying shared goals and values.

Emotion	Related Feelings
Happiness	Joy, Contentment, Delight
Sadness	Grief, Sorrow, Despair
Anger	Rage, Fury, Outrage
Fear	Anxiety, Terror, Panic
Surprise	Astonishment, Amazement, Shock
Disgust	Aversion, Revulsion, Distaste

Handling Emotions During Stressful Conversations

- Recognize and acknowledge your own emotions
- Take breaks if needed to calm down
- Use calming techniques (deep breathing, mindfulness)
- Validate the other person's emotions without getting defensive

Difficult Conversations

- **Follow up:** Check in after the conversation to ensure understanding.
- **Apologize when necessary:** Take responsibility for your role in the conflict.
- **Focus on solutions, not blame.**
- **Maintain open and honest communication moving forward.**



Conclusion

Difficult conversations are an essential part of life and work.

Effective communication skills are crucial for navigating challenges.

By mastering these skills, you can build stronger relationships, resolve conflicts, and achieve your goals.

Difficult Conversations: Scenario Practice

You are meeting with a tax team member who is frustrated about their workload. They feel they are consistently given more complex, difficult clients than their peers and they would like some easier clients/workload in the future.

INCORRECT – Defensive and Dismissive. Minimizes their concern, makes the employee feel unheard, and shifts the blame.

INCORRECT – overly accommodating and unsustainable. This could create an unfair workload for others and sets an unrealistic precedent.

CORRECT – balanced and solution oriented. Acknowledges the concern, remains professional, and offers a constructive solution.

Difficult Conversations: Scenario Practice

A tax team member is frustrated because they were not chosen for a new high-profile client. A colleague was chosen instead. They feel undervalued and question why they were not chosen/given the opportunity.

INCORRECT – Defensive and unhelpful. Dismisses their concern.

CORRECT – Transparent and growth focused. Acknowledges feelings, provides reasoning, and offers a path forward.

INCORRECT – Apologies without a solution.

Taking it back to the office

Taking it back to the office



Know your audience:



Build your relationships



Use clear, concise language



Use data-driven insights

As we head back to the office there are some key takeaways that we can start implementing this week.

Taking it back to the office

Problem-Solving:

- Centers on identifying and resolving issues
- Prioritizes finding effective solutions
- Emphasizes logic, analysis, and objective evaluation

People-Pleasing:

- Centers on gaining approval and avoiding conflict.
- Prioritizes maintaining harmony and avoiding negative emotions.
- Emphasizes empathy and accommodating others' needs

Problem Solving Vs. People Pleasing

Key things on the left to
remember about each

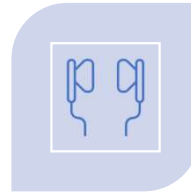
Taking it back to the office



CHOOSE THE RIGHT
TIME AND PLACE



PLAN YOUR
APPROACH



PRACTICE ACTIVE
LISTENING



FOCUS ON "I"
STATEMENTS



ACKNOWLEDGE THE
OTHER PERSONS
PERSPECTIVE

Preparing for Difficult Conversations

Choose the right time and place: Find a private, neutral setting.

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Questions





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LEARN. COLLABORATE. INNOVATE.

Thank You!