



2025 RESOURCE MANAGEMENT GLOBAL SYMPOSIUM

April 7 - 9, 2025 • Indianapolis, IN



From Utilization to Elevation: Driving Organizational Impact Through Strategic Resource Management

Beth Hunter

Resource Experience Management Leader

Rehmann
EMPOWER YOUR PURPOSE®



Beth Hunter

Resource Experience Management Leader
Rehmann

Beth Hunter, the Resource Experience Management (REM) Leader at Rehmann, is positioning and scaling the RMO for success. Beth is deeply committed to aligning individuals, projects, and schedules, and she channels her passion into inspiring and nurturing teams to cultivate the same ethos of collaboration and synchronicity. Accomplished by seeking to understand stakeholder perspectives, she operates from a growth mindset with compassion, fortitude, and integrity.

Before joining Rehmann, Beth spent a decade at a Big 4 firm, where she led resourcing for the Business Design practice of 260+ consultants across the US. Her role involved balancing pipeline demand with availability, strategically considering business needs, project preferences, individual working styles, diversity, and team dynamics. During her tenure, Beth achieved remarkable results, including 115% net full-time equivalent (FTE) growth, a 16% increase in utilization, and reduction in missed timesheets from ~10% to under1%!

Beth's expertise extends to experience management, and she was featured on the [Unboxing Humans \[open.spotify.com\]](https://open.spotify.com/show/unboxinghumans) podcast with Danielle Boris. As a Resource Management Certified Professional (RMCP)®, she brings her passion for people-first management to Rehmann, ensuring the firm continues to thrive by prioritizing its talented workforce, and champions "Empowerment drives success. Each associate represents a spoke on the engagement team wheel where exceptional delivery rides on strategically and collaboratively balanced team, leadership, firm, and client tires."

Beth holds a bachelor's degree in business administration from Bryan College and enjoys been an integral part of Rehmann since October 2023.

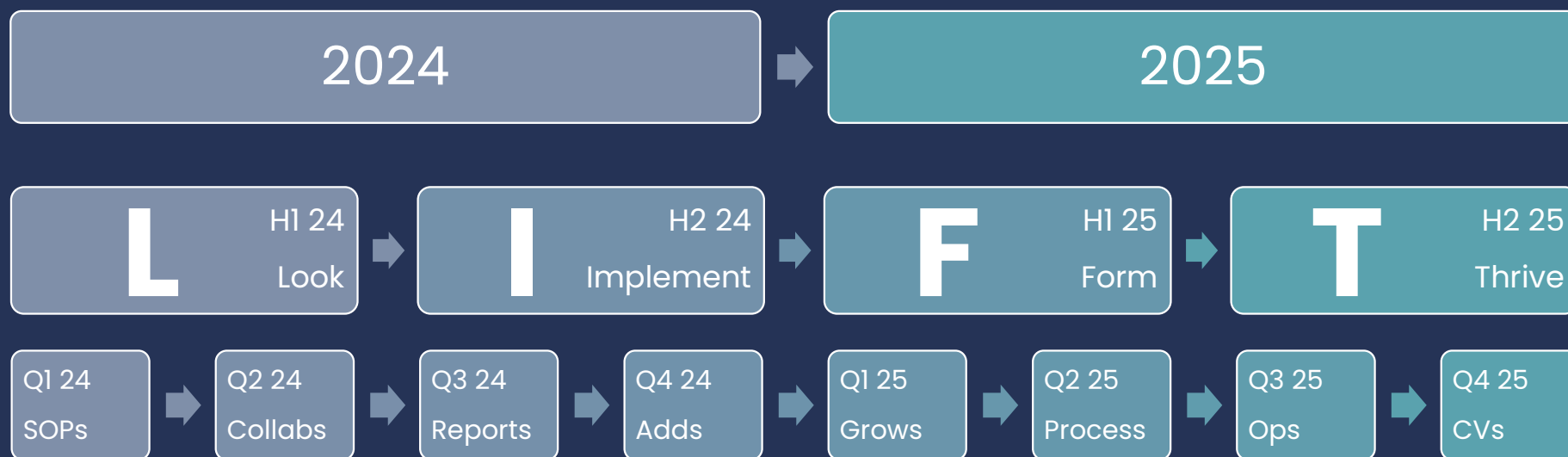
Agenda

- 1** Checking Rearview
- 2** Steering Committee
- 3** Rounding JITR®
- 4** Refueling Feedback
- 5** Lifting Lessons
- 6** Q&A

Checking Rearview



Checking Rearview: LIFT



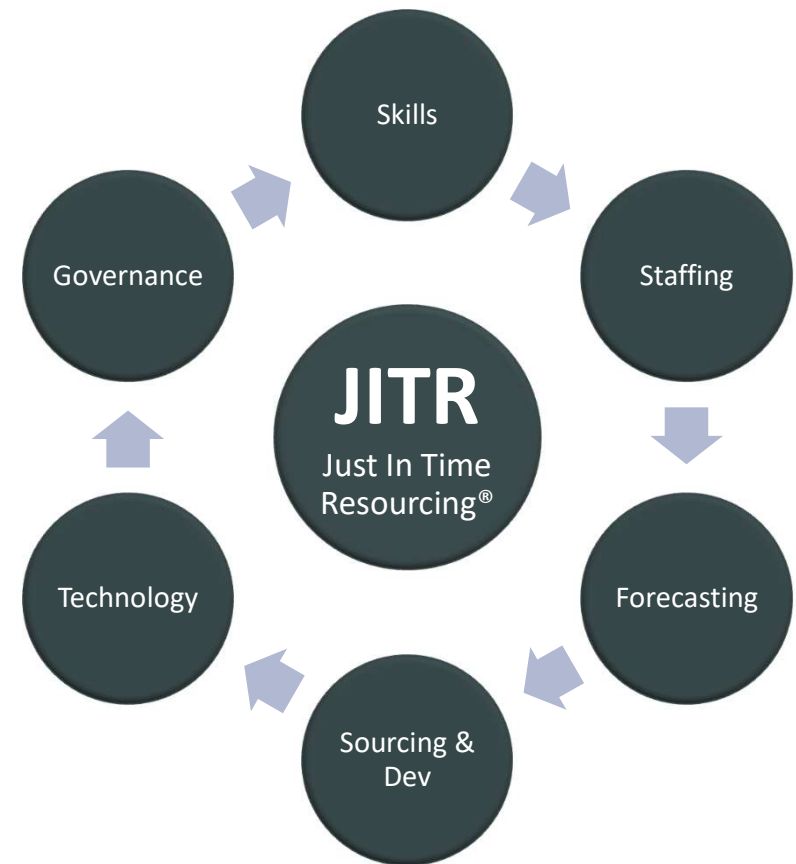
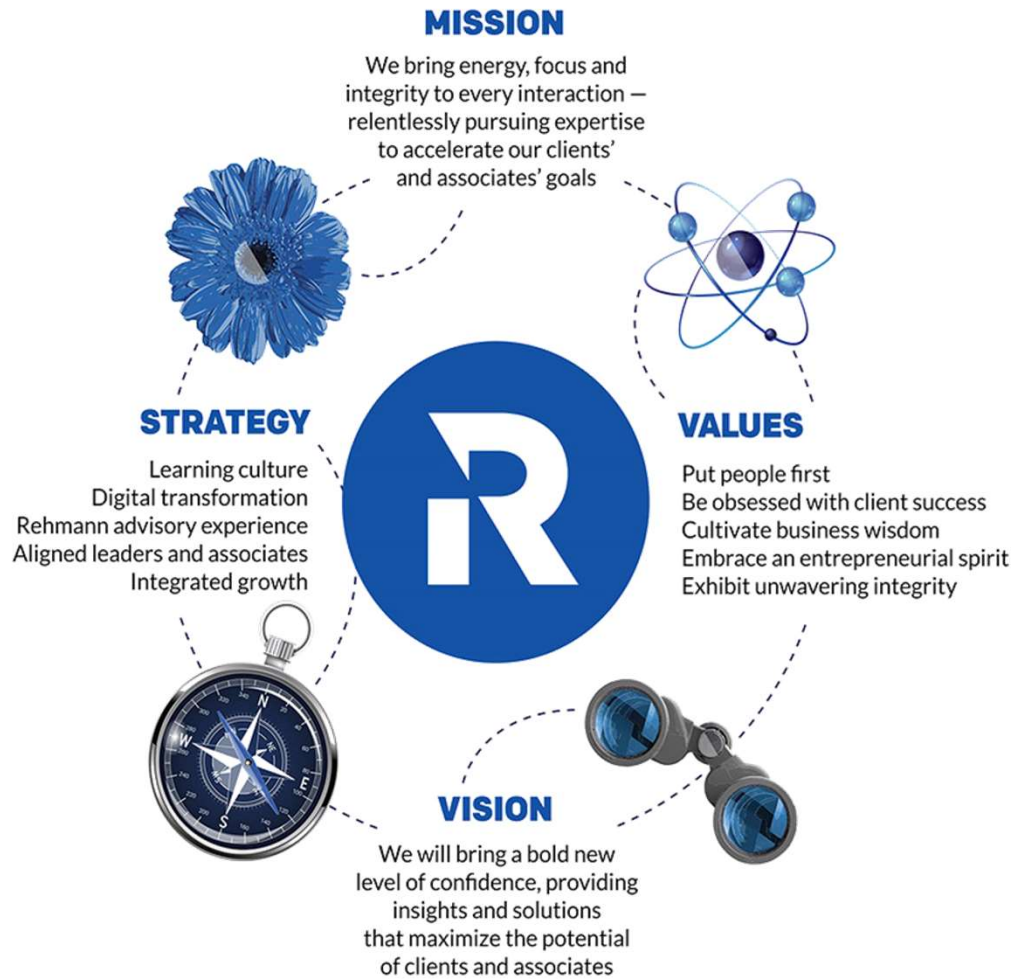
Steering Committee



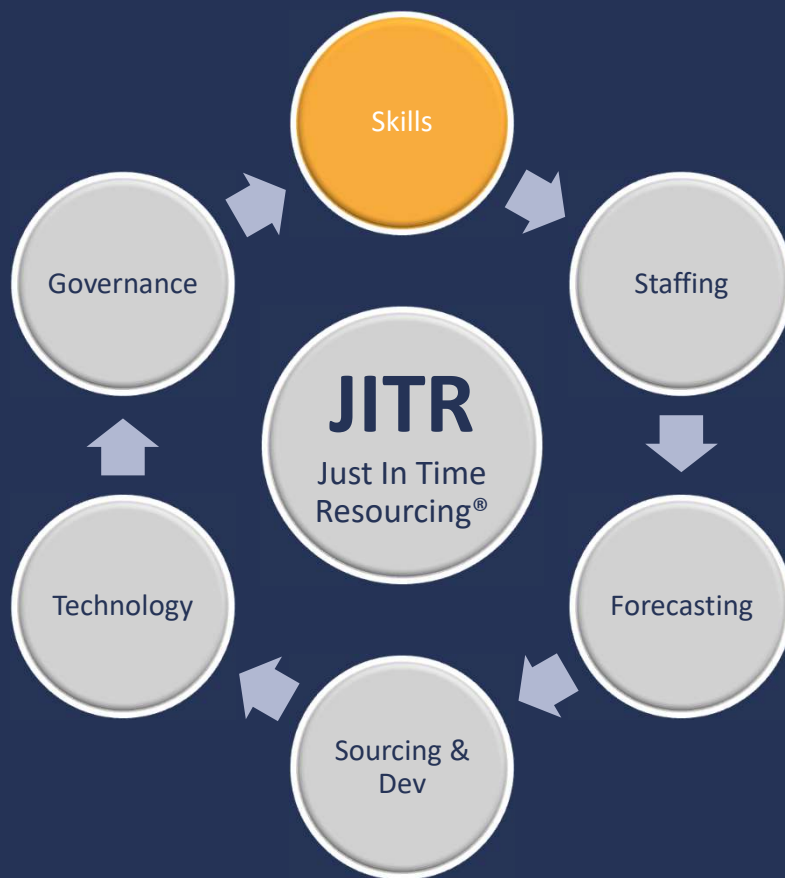
Rounding JITR[®]



Rounding JITR®



Rounding JITR®: SKILLS



Rounding JITR®: SKILLS

Skill Category ^	Skill Sub Category ^	Skill Type ^	Exp (Yrs) ^	Skill Level	Interest	Notes
Advisory and Tax	▼ Tax Review	▼ Corporations - 1120	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Tax Review	▼ S Corporations - 1120-S	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Tax Review	▼ Partnership - 1065	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Tax Review	▼ Individual - 1040, 1040NR, PPT, MI PTE	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Tax Consulting	▼ Tax Research	▼ 25	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Tax Consulting	▼ Mergers & Acquisitions	▼ 20	4 - Work on Independently ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Other Skills - Tax	▼ Accounting / Journal Entries	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
Advisory and Tax	▼ Industries - Tax	▼ Real Estate	▼ 30	5 - Able to Train/Teach/Mar ▼	<input type="checkbox"/>	
	▼	▼		▼	<input type="checkbox"/>	

Rounding JITR®: SKILLS

Skill Category ^	Skill Sub Category ^	Skill Type ^	Exp (Yrs) ^	Skill Level	Interest	Notes
Assurance	▼ Audit	▼ EB Audit	▼	4 - Work on Independently ▼	<input type="checkbox"/>	
Assurance	▼ Audit	▼ Construction	▼	2 - Worked on Before ▼	<input type="checkbox"/>	
Assurance	▼ Audit	▼ Manufacturing	▼	3 - Work on Regularly ▼	<input type="checkbox"/>	
Assurance	▼ Review / Comp	▼ Construction	▼	2 - Worked on Before ▼	<input type="checkbox"/>	
Assurance	▼ Review / Comp	▼ General	▼	2 - Worked on Before ▼	<input type="checkbox"/>	
Assurance	▼ SOX404	▼ General	▼	0 - Zero Experience ▼	<input checked="" type="checkbox"/>	
Assurance	▼ Internal Controls Testing	▼ General	▼	1 - Little to Basic Experien ▼	<input checked="" type="checkbox"/>	
	▼	▼	▼	▼	<input type="checkbox"/>	

Skill Category ^	Skill Sub Category ^	Skill Type ^	Exp (Yrs) ^	Skill Level	Interest	Notes
Assurance	▼ Audit	▼ Single Audit	▼ 10	1 - Little to Basic Experien ▼	<input type="checkbox"/>	I partner with someone on
Assurance	▼ Audit	▼ EB Audit	▼ 10	4 - Work on Independently ▼	<input type="checkbox"/>	I work on plain vanilla defined
Assurance	▼ Audit	▼ Consolidations	▼ 10	5 - Able to Train/Teach/Mar ▼	<input checked="" type="checkbox"/>	
Assurance	▼ Audit	▼ Commercial (SEC or Non SEC)	▼ 10	5 - Able to Train/Teach/Mar ▼	<input checked="" type="checkbox"/>	
Assurance	▼ Audit	▼ Higher Ed	▼ 5	4 - Work on Independently ▼	<input checked="" type="checkbox"/>	Non-gasb only :)
Assurance	▼ Audit	▼ Non Profit	▼ 10	5 - Able to Train/Teach/Mar ▼	<input checked="" type="checkbox"/>	Have a large amount of NFP
Assurance	▼ Review / Comp	▼ Non Profit	▼ 10	5 - Able to Train/Teach/Mar ▼	<input checked="" type="checkbox"/>	

Rounding JITR®: SKILLS

Skill Category ^	Skill Sub Category ^	Skill Type ^	Exp (Yrs) ^	Skill Level	Interest	Notes
Solutions	Industry (SOL)	Construction (SOL)		1 - Little to Basic Experience	<input type="checkbox"/>	
Solutions	Industry (SOL)	Healthcare		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	
Solutions	Industry (SOL)	Non-Profit (SOL)		0 - Zero Experience	<input type="checkbox"/>	
Solutions	Industry (SOL)	Service		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	
Solutions	Industry (SOL)	Real Estate		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	
Solutions	Industry (SOL)	Cannabis		0 - Zero Experience	<input type="checkbox"/>	
Solutions	Industry (SOL)	Small Business		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	
Solutions	Software (SOL)	QBO		3 - Work on Regularly	<input type="checkbox"/>	
Solutions	Software (SOL)	QBD		3 - Work on Regularly	<input type="checkbox"/>	
Solutions	Software (SOL)	QB Enterprise		3 - Work on Regularly	<input type="checkbox"/>	
Solutions	Software (SOL)	Intacct		0 - Zero Experience	<input type="checkbox"/>	
Solutions	Software (SOL)	ACS		1 - Little to Basic Experience	<input type="checkbox"/>	
Solutions	Software (SOL)	CCH Engagement		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	
Solutions	Software (SOL)	Gusto		1 - Little to Basic Experience	<input type="checkbox"/>	
Solutions	Software (SOL)	Trupay/Kronos		0 - Zero Experience	<input type="checkbox"/>	
Solutions	Software (SOL)	Fixed Asset CS		5 - Able to Train/Teach/Mar	<input type="checkbox"/>	

Rounding JITR®: SKILLS

-1

Non-Preference

I have little to no interest in developing this skill.

0

Zero Experience

I have no experience in this area.

1

Little to Basic Experience

I have some experience with this type of engagement or software, e.g. detailed tasks like testing after sample selection by others. I would need assistance in completing these tasks.

2

Worked on Before

I have skills beyond the basics in certain aspects of this engagement/software. I'm comfortable handling initial client inquiries and selecting samples. If issues arise, I can suggest solutions and seek guidance from an in-charge or supervisor.

3

Work on Regularly

I have strong knowledge of this engagement/software and am comfortable training others. I can communicate with clients directly and guide the team throughout the engagement.

4

Work on Independently

With several years of experience, I can work independently and am a reliable point of contact for complex questions. I'm skilled in researching relevant accounting/auditing guidance to refine the approach as needed.

5

Able to Train/Teach/Manage Others

I can run this engagement independently, confidently consulting with clients and answering questions. I've mastered this skill and can teach or train others in skill/software.

We are a
TEACHING
hospital

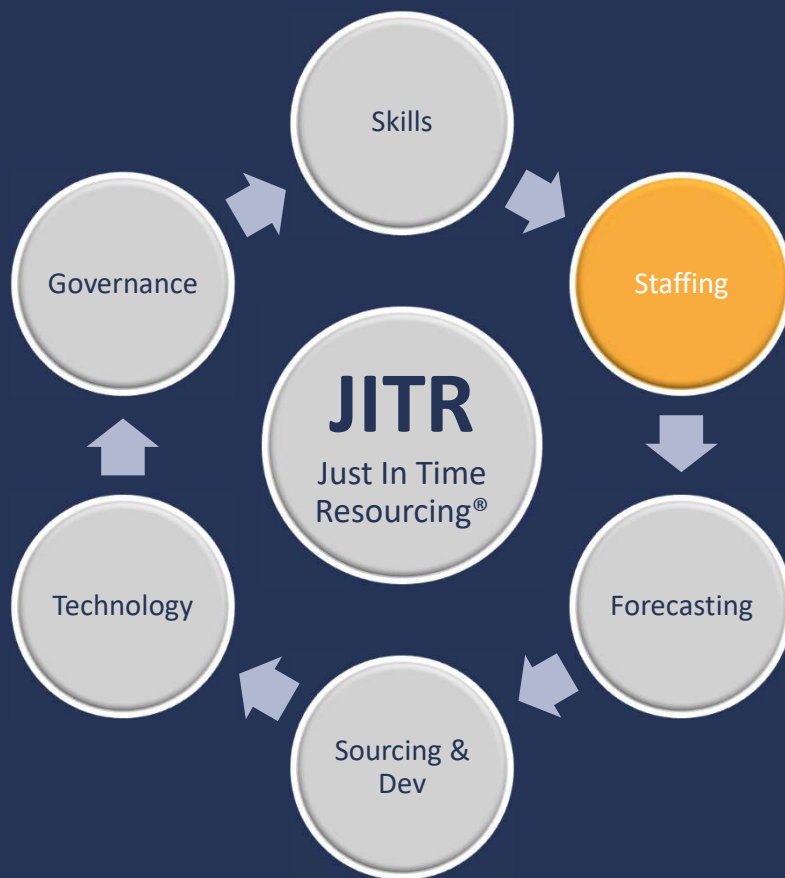


Rounding JITR®: SKILLS Decisions/Actions/Charter Excerpt

1. Update skills in quarterly 1:1s with performance review discussions.
2. Skills update requires supervisor approval.

Objective	KPI
Skills	
Work with the business to expand centralized skills inventory and classification system to standardize skills and role definitions.	Populated by either the associate or REM, obtain and maintain TBD % of associates with populated/updated skills.
Work with HR to drive regular competency updates and encourage associates to participate actively in skill assessments and updates.	
Collaborate with HR and performance management teams to ensure non-compliance is addressed and skills are continuously developed.	

Rounding JITR®: STAFFING



Rounding JITR®: STAFFING Case Study

A principal out of our Detroit office, Marshall Mathers, requested a senior for the Aftermath audit. With commercial experience and availability, he hoped to leverage Ann Arbor senior, Ella. Available 9/9, Ann Arbor principal, Bob Seger was supportive but was clear that he needed her for Silver Bullet on 9/16. Aftermath had reliably been a one-week audit for the past several years; so, both principals were Not Afraid.

However, on 9/13, Ella found a material weakness in ICFR. Marshall may have a solid option to help with documentation, but what about knowledge transfer and continued senior support if/when Ella (Night) Moves back to Bob's project?

Rounding JITR®: STAFFING Case Study

Demand		
Location	Detroit	AA
PIC	Marshall	Bob
Client	Aftermath	Silver Bullet
Start	9/9	9/16
Level	1 Senior	1 Manager, 2 Seniors, 3 Staff

Supply					
Name	Level	Location	Skills	Avail	Util
Trigger	Staff	AA	EB	9/16	85%
Dante	Staff	TOA	Public Sector	9/9	80%
Fonzie	Staff	DET	Comps Reviews EB	9/1	60%
Biscuits	Senior	TOA	Comps Reviews	9/16	90%
Ella	Senior	AA	Commercial Manufacturing	9/9	75%
Jace	Senior	TROY	Commercial Manufacturing Dealerships	9/1	60%
Duke	Manager	ORL	Government Single Audit	9/23	55%
Rizzo	Manager	DET	Risk Advisory SOC	9/9, 50%	75%
Finn	Senior Manager	JAX	Government Public Sector Higher Ed	9/1, 50%	45%

How does each decision impact the principals, clients, and other team members?

Who is the logical documentation help? Why?

What if Ella prefers Aftermath? Silver Bullet?

Jace rocks whichever client he does and gains experience and confidence. The opposite can also happen. PIP or termination to make room for more motivated professional.

Is there an option to fully utilize two resources? increase throughput/revenue?

Rank awareness/approval prioritization (#1 highest priority; #6 lowest). The Associate's:

- Current project principal
- Location principal
- Next project principal, if applicable
- REM
- Self (The Associate)
- Supervisor

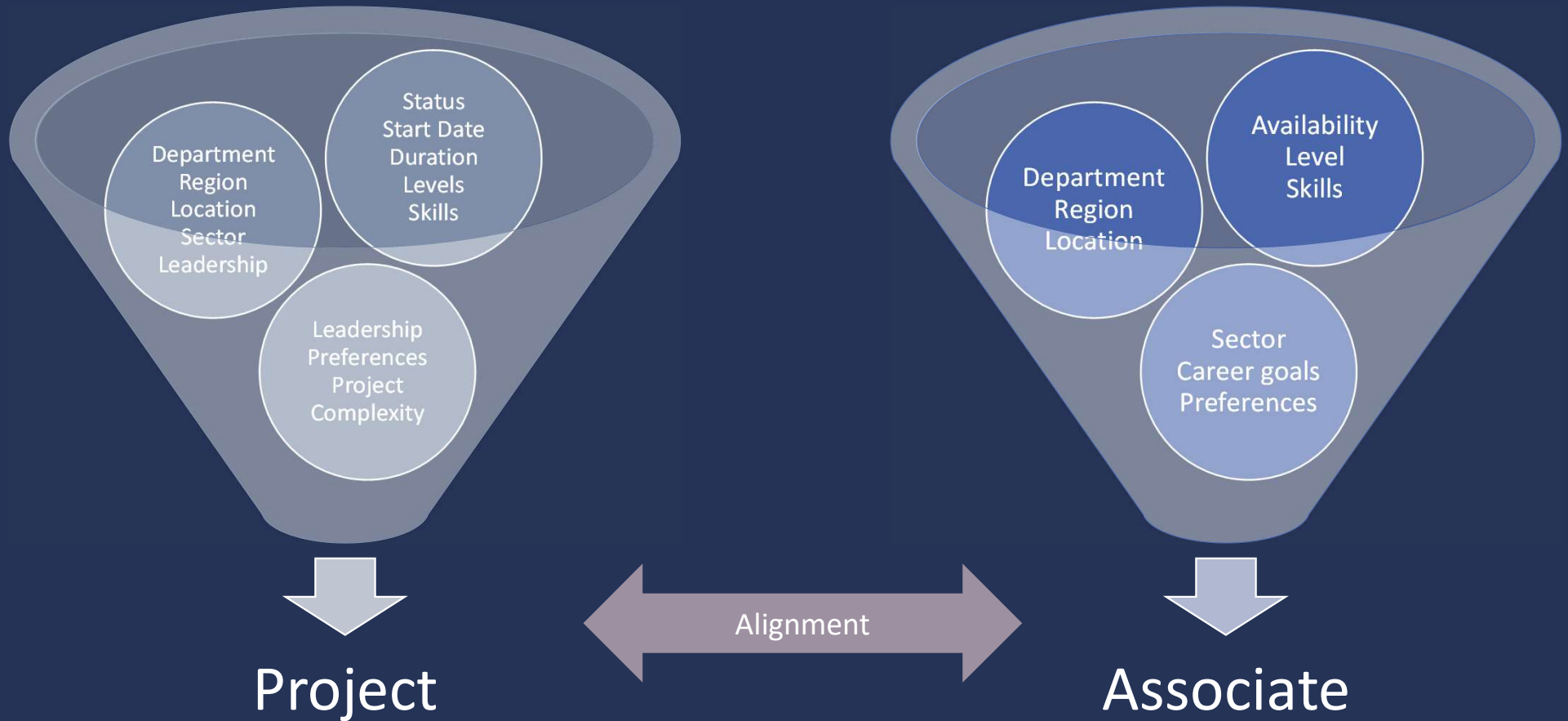
How might our decision be impacted if Aftermath or Silver Bullet was a strategically prioritized client? Low risk? Prepared?

How are associate utilization rates helpful in staffing decisions?

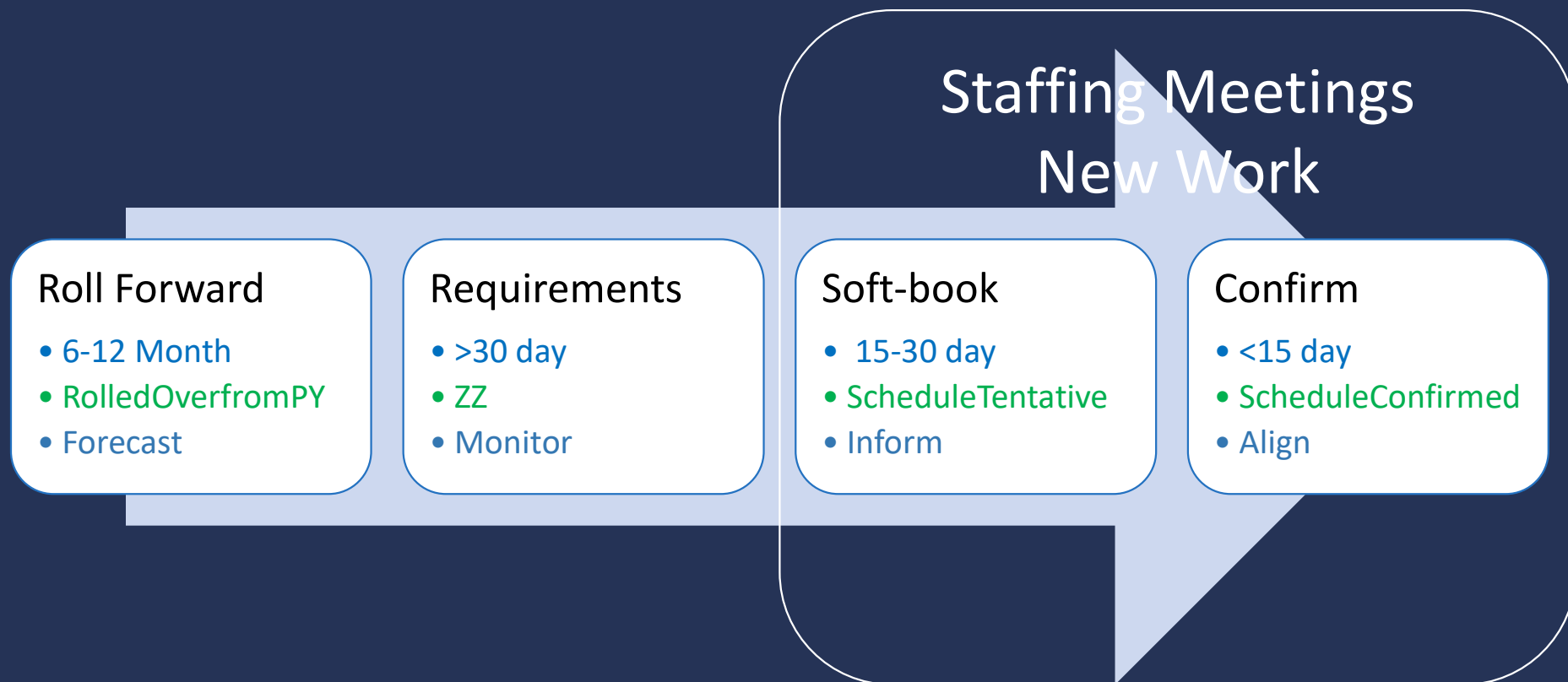
What if Jace's util rate was 80%

What is REM's most impactful contribution in this scenario?

Rounding JITR®: STAFFING Demand Supply Balancing (DSB)



Rounding JITR®: STAFFING Cycle



Rounding JITR®: STAFFING Forms

Resource Request Form - AFR & Public Sector					
This form is to be used when staffing is needed for new engagements or projects not currently part of the recurring jobs scheduled in ProStaff					
CLIENT INFORMATION					
Department	Client Name	Job Name	Client Location (if onsite)		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
REHMANN POINTS OF CONTACT					
Principal in Charge	Manager in Charge	Other Contacts			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
ENGAGEMENT					
Job Type	Industry	Star Job Created	Job Stage	<input type="checkbox"/> Opportunity <input type="checkbox"/> Proposal <input type="checkbox"/> Closed Won	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
EXPECTED RESPONSE TIMELINE					
Anticipated Start Date	Fieldwork Dates	Anticipated Completion Date	Number of Associates Needed	Project Hour Goal (Excluding Principle)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
ASSOCIATE LEVEL					
Preferred	Acceptable	Work Format	Weekly Hours Requested	TOA	Cross Functional Dept.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred	Acceptable	Work Format	Weekly Hours Requested	TOA	Cross Functional Dept.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Preferred	Acceptable	Work Format	Weekly Hours Requested	TOA	Cross Functional Dept.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ASSOCIATE SKILL SET					
Skills	Service Line	Other Information			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
COMMENTS:					
<input type="text"/>					
<div>Email Staffing Request</div> <div>Please do not Save after emailing Staffing Request</div>					

From: REM <REM@rehmann.com>
To: REM <REM@rehmann.com>
Subject: Staffing Confirmation / Associate Name / Client Name

Hello _____,

This email serves as your official staffing confirmation for the following engagement:

- **Client Name:**
- **Job Name:**
- **Date(s) & Hours:**
- **Project Contact:**
- **Notes:**

If the project contact has not already reached out, s/he will connect with you to discuss the project details and expectations for your role. Your supervisor and project leadership have been cc'd for alignment.

Schedule Review:

Please review your schedule. See [Prostaff Example.jpg](#) as a guide. Your participation on this engagement is essential to achieving individual, team, firm, and client objectives. You are expected to fulfill the requirements outlined in this staffing confirmation. **If there are changes** – either a reduction in (illness, project delay, etc.) or additional requests for (extensions, another project, etc.) your time, **it is your responsibility to notify REM at REM@rehmann.com.**

Daily Timesheet Submission:

Please adhere to the Firm's Time and Expense policy as stated on page 54 of the [Associate Guide.pdf](#). Ensure that clear, accurate, and detailed time records are prepared daily by 9:00 a.m. the following day. Should you have any questions regarding charging time on this project, reach out to your project supervisor.

Feedback Request:

We encourage you to seek feedback from your project team. Actively pursuing feedback benefits your growth on this project and your professional development, overall. We hope you find your project both challenging and rewarding!

Please reach out if you have any questions.

Best regards,

Resource Experience Management Team (REM)
RCS ICM Resource Coordinators
 Corporate Services

Rehmann
REM@rehmann.com

Rounding JITR®: STAFFING Meetings



Participants	Office Leadership	REM	PM
Roles	Prioritize attendance Support REM Processes	Organize and lead meetings	Provide engagement updates Assess needs
Actions	Model Adoption Encourage Compliance	Generate and distribute DSB* reports Update systems Propose resources	Communicate updates

*Demand Supply Balancing (DSB)

Rounding JITR®: STAFFING Decisions/Actions

Project prioritization

1. Risk
2. Strategy
3. Associate preference
4. Client preference
5. Profitability/Realization
6. Client preparedness
7. Extension possibility
8. Sold Status
9. Location
10. Principal preference

Escalation Path

1. Staffing meeting, collectively
2. PMs, separately
3. Location principals
4. Regional principals
5. Department principals

Rounding JITR®: STAFFING Charter Excerpt

Objective	KPI
Staffing	
Optimize centralized and standardized staffing model for consistent and proactive resource allocation across projects, aligning the right person on the right project at the right time.	Acknowledge staffing requests within one (1) business day. Reflect internal client satisfaction TBD% based on employee engagement survey results. Reflect external client satisfaction TBD% 70% based on favorable NPS score.
Leverage augmented talent consistent with firm strategy.	Future KPI TBD .
Define and maintain a process that supports early visibility into new workstreams and allows for accurate assignment matching based on project and skill requirements.	Create/roll TBD% jobs 6 – 12 months in advance, leveraging automation when possible. Adjust for promotions, new hires, attrition, etc. with project leadership three (3) months from project start date. Fine tune during staffing meetings for current and immediate future alignments.
Structure and enforce staffing decisions based on the prioritization framework provided: The SteerCo guidelines emphasize a strategic and balanced approach to staffing, focusing on the firm's goals, the project's needs, and the professional development of individual associates. The prioritization list weights factors progressively, meaning earlier items carry more weight than those listed later. Prioritization Hierarchy (in order of importance): 1. Risk Higher risk projects are prioritized. 2. Strategy Align staffing decisions with the firm's long-term strategic goals, leveraging <i>2025 Matrix of Strategic Priorities</i> as a guide. 3. Associate Preference Consider the associate's expressed preferences to promote engagement, career growth, and job satisfaction. This fosters a culture of collaboration and support. 4. Client Preference Respect client preferences when feasible, balancing their input with the firm's overall strategy and goals. 5. Profitability/Realization Factor in financial considerations, prioritizing projects that enhance profitability or maintain strong realization metrics. 6. Client Preparedness Evaluate the client's readiness to proceed with the project effectively. Assign resources where preparedness ensures smoother project execution.	Schedule, run and action weekly or biweekly staffing meetings as updated and recorded in <i>Staffing Meetings.xlsx</i> . Update <i>Staffing Meetings.xlsx</i> with changes to participants, cadence, REM alignment, etc.

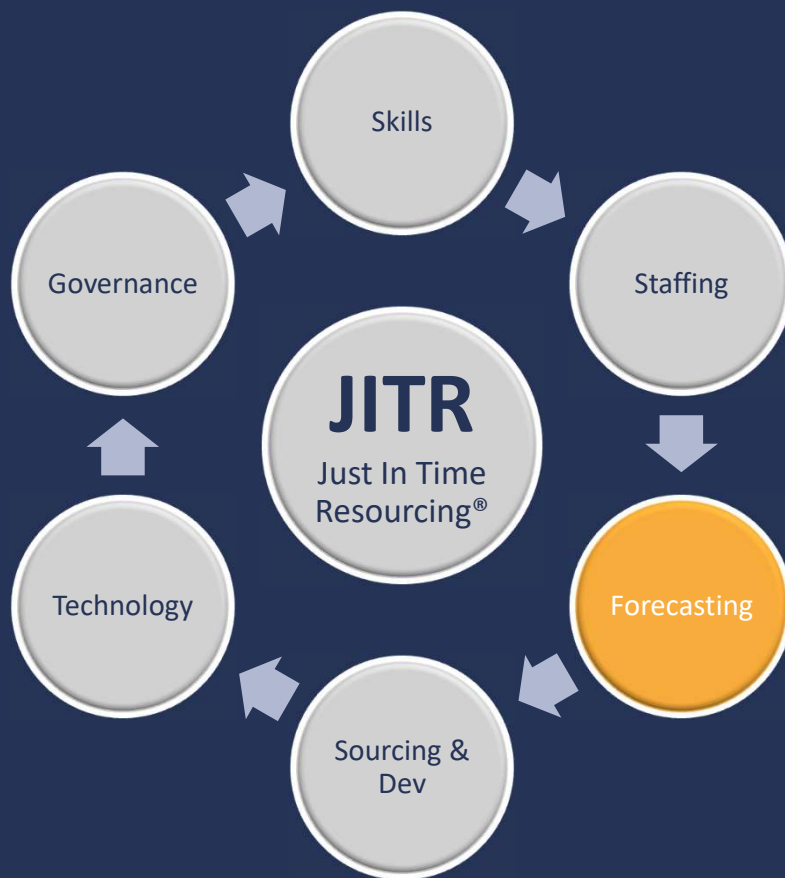
7. Extension Possibility Consider the likelihood of extending the current engagement to ensure continuity and long-term collaboration opportunities. 8. Sold Status Prioritize projects with confirmed contracts or sold status to allocate resources efficiently and avoid potential delays. 9. Location Assign associates to projects that align geographically to reduce travel costs and support work-life balance where possible. 10. Principal Preference Consider input from principals, though this is a lower priority relative to other factors. Principal preferences are weighed against the broader needs of the project and firm. Approach to Balancing Priorities: <ul style="list-style-type: none"> Decisions should be made in alignment with this hierarchy, keeping the highest-priority factors (risk, strategic goals and associate preferences) at the forefront. Lower-priority factors like location or principal preference should only influence decisions when higher-priority criteria are equally balanced or already satisfied. Communication is key: Clearly articulate the rationale behind staffing choices to stakeholders, ensuring transparency and alignment with the guidelines. 	
Follow agreed upon staffing conflict escalation path: 1. Project Points of Contact, collectively (staffing meeting) 2. Project Points of Contact, separately 3. Location Principals 4. Regional Department Heads 5. Department Director	

Maintain and promote use of current standardized forms to uniformly and transparently align processes and decisions.

Distribute and encourage use of *Resource Request Form* for staffing that occurs outside of the roll forward process or staffing meetings.

Use *Staffing Confirmation.msg* to confirm project alignments.

Rounding JITR®: FORECASTING



Rounding JITR®: FORECASTING Process

Step	Guidance	Current Process
Collect the Data	<ul style="list-style-type: none"> Determine which data to use: run rate, pipeline, historical revenue, market trends, seasonality, etc. The more automated, the better. 	<ul style="list-style-type: none"> Roll forward PY: T&E/BI (WIP).
Analyze the Data	<ul style="list-style-type: none"> Review for conflicting data from separate systems. Note pricing changes, new competitors, market growth, M&A, etc. Evaluate for strategic alignment. The more automated, the better. 	<ul style="list-style-type: none"> Generate completeness reports.
Create the Forecast Draft	<ul style="list-style-type: none"> Determine data elements: Run Rate, Pipeline, WIP, Desired Service Mix Ratio. Layer in cost recovery and growth assumptions for most comprehensive views. 	<ul style="list-style-type: none"> Populate PSA.
Build the Functional Interlock	<ul style="list-style-type: none"> Top-down meets bottoms-up: Map each revenue forecast scenario to resources by headcount, timing, skills, gaps, etc. to reconcile revenue forecast with demand forecast. 	<ul style="list-style-type: none"> Meet with teams/managers to fine-tune forecast, adjusting for CY holidays, experience and availability.
Review & Adjust	<ul style="list-style-type: none"> Review and decision for reasonableness. Adjust and finalize. 	<ul style="list-style-type: none"> Adjust as necessary.

While there are many automation tools available, the best solutions will provide a single system for centralizing the collection, analysis, and documentation of supporting data, and replace legacy multi-data entry systems with a single point of data entry and integrated workflows. The end result: lower costs, better data accuracy, and better throughput.

Rounding JITR®: FORECASTING Process

Meat (main ingredient)
Charge Hours

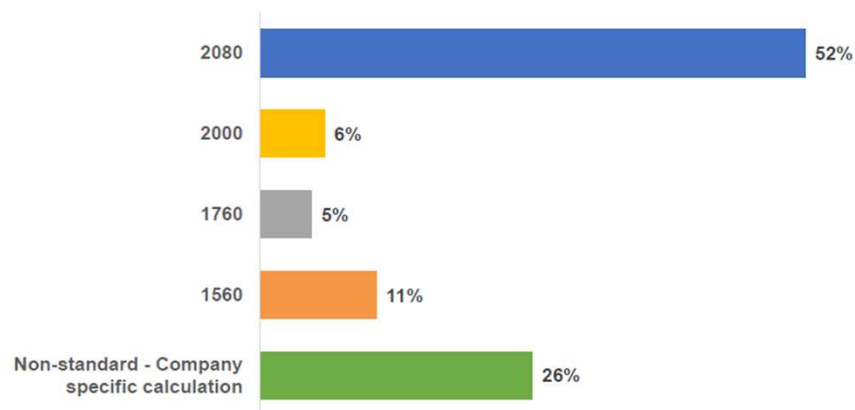
Potatoes (additional time-specific allocations)
PTO
Trainings
Town Halls

Toothpaste (necessary, but not in a roast)
Time sheets
Expense reports
Travel arrangements
Performance discussions
1:ls
Committee involvement
Practice development



Rounding JITR®: FORECASTING Support

Q5. What standard do you use for the denominator of the utilization calculation?



The 2080 standard recommended by the RMI is now used by 52% of organizations serving external customers, up from 44% in 2021. Organizations utilizing company-specific denominators are encouraged to adopt the 2080 standard to enable more precise peer-to-peer benchmarking.

Non-standard – Company specific calculation responses:

- 2080 less PTO and Holidays
- 2100 or 2350
- Capacity adjusted by general absence
- 2052
- 1920
- We use the scheduled hours per week as the denominator
- 1900
- 1810
- Non-standard calculation that accounts for up to 10 days of PTO
- Working hours by country, adjusted for holidays
- Depends on location as we are a global organization
- We pull out an absence from the denominator
- 1800
- Potential Billable Hours that is based on individual

PS/CS, AATA, MA, LF

©2007 - 2024 RTM Consulting, LLC a Belcan Company / RMI. All Rights Reserved.

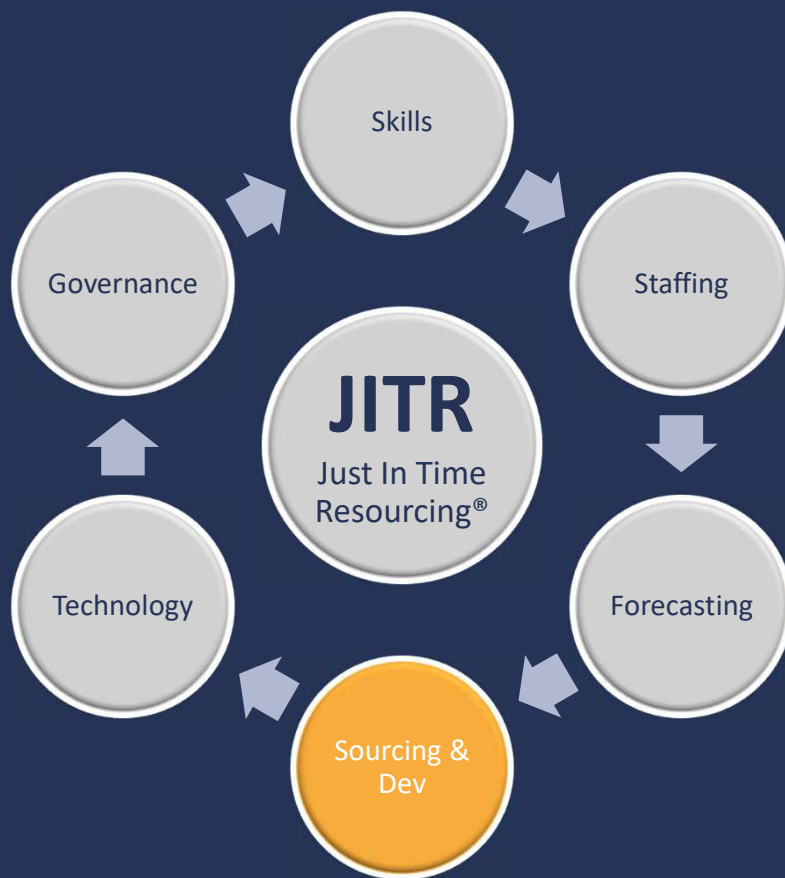
10

Rounding JITR®: FORECASTING Decisions/Actions/Charter Excerpt


1. Quantum for performance; PSA for scheduling.
2. Set PSA capacity to 40 hours throughout the year; adjust for FWAs.
3. Include charge hours only (or what prevents them, i.e. PTO, training, office events, etc.) in PSA.

Objective	KPI
Forecasting	
Adherence to standardized forecasting process, improving visibility into upcoming resource needs and project requirements. <ul style="list-style-type: none"> Standardized scheduled hours include charge hours only (or any scheduled events that prevent chargeable hours (e.g., PTO, leaves, trainings, town hall meetings, etc.)), and specifically excludes administrative tasks, (e.g., time sheets, expense reports, travel arrangements, performance discussions/1:1s) which may be completed outside specific time constraints. Standardized capacity @ 40 hours/week, or as adjusted for Flexible Work Arrangements (FWAs). 	Populate and maintain ProStaff accurately and efficiently.
Establish communication with business units to refine forecast accuracy and enhance project planning.	Leverage technology and automation to provide standardized observation reporting to promote data-driven decisions, including: WTD, MTD and YTD performance, comparing plan, forecast and actuals with weekly insights impacting utilization and performance.
Organize forecasting interlock* (The process of continuously reviewing, validating, and preparing for the potential opportunities and/or projects that are in the pipeline.) meetings to align enablement teams (e.g., Finance, HR, Recruiting, REM and the business (population)) for continuous review, validation, and preparation for the potential opportunities and/or projects that are in the pipeline.	Maintain accurate forecast within 10% per month out.
	Future goal TBD

Rounding JITR®: SOURCING & DEVELOPMENT



Rounding JITR®: SOURCING & DEVELOPMENT

New-hire Intros	Training/Ed	Committees	Support
 <ul style="list-style-type: none"> • Experience • Skills • Professional Goals 	 <ul style="list-style-type: none"> • PSA and Workflow Tools • Skills • Reporting 	 <ul style="list-style-type: none"> • Talent Augmentation • Data Integrity • Survey • SteerCo 	 <ul style="list-style-type: none"> • Associates • Leadership • Departments

Rounding JITR®: SOURCING & DEVELOPMENT

Performance Management

- Competency Tracking
- Frequently occurring 1:1s

Scheduling

- 2080
- Capacity and Utilization Goals
- Transparency and Efficiency
- Key Principle: Separate Performance from Scheduling
- Rather than scheduling non-charge differentiators. We should reward them in more frequently occurring 1:1s where we show up, commit to our counselee's careers and drive engagement from a place of transparency and authenticity.

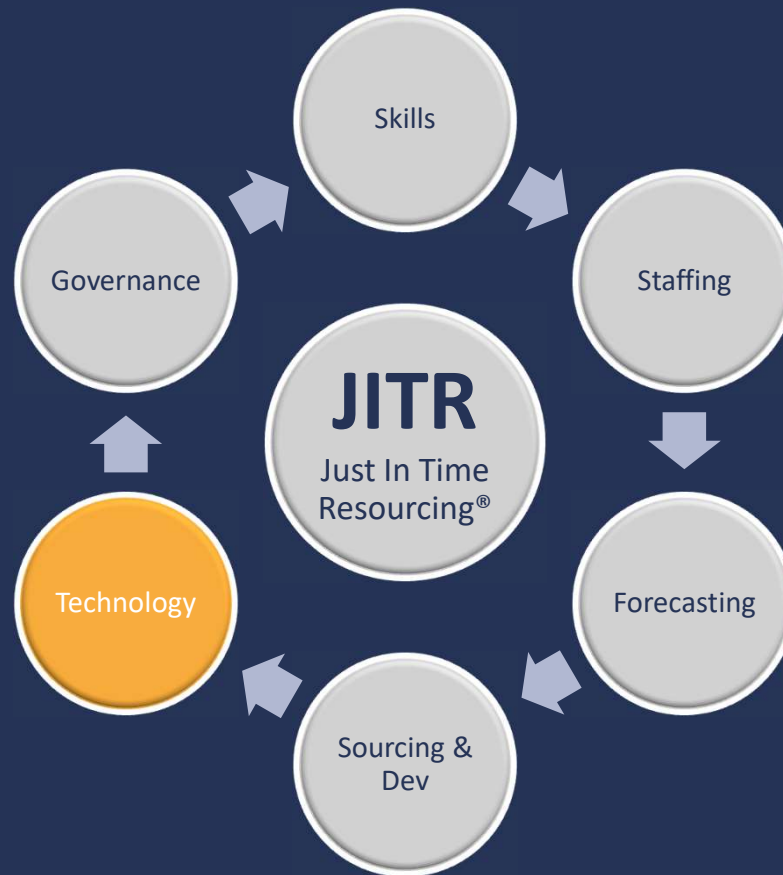
Rounding JITR®: SOURCING & DEVELOPMENT Decisions/Actions/Charter Excerpt

1. Performance Management for performance; PSA for scheduling.
2. Set PSA capacity to 40 hours throughout the year; adjust for FWAs.
3. Include billable hours only (or what prevents them, i.e. PTO, training, office events, etc.) in PSA.

Objective	KPI
Sourcing & Development	
Align REM processes with talent acquisition by supporting a warm-pool* (strategy of peak load planning, it is the process of continuously recruiting for the most common resources needs.) recruiting strategy and supporting centralized hiring for new talent.	Future goal TBD
Support opportunities for associate growth and cross-functional skills development.	Achieve TBD % Cross-Staffing.
Collaborate with HR to streamline hiring processes for immediate resource needs and future workforce planning. Data, Budget hours, FWAs, and staffing-related performance issues	Facilitate TBD # touchpoints with Human Resources Business Partner (HRBP).
Collaborate with HR and new hire associate to schedule introductory call to become familiar with skills, interests and demonstrate REM function.	Host TBD % New hire interactions.

Rounding JITR®: TECHNOLOGY

Is Technology Helping or Hurting Your Employee Retention Efforts?



Qualtrics report shows employees are 230% more engaged and 85% more likely to stay in a job longer than three years if they have the technology tools they need to do their job.

Rounding JITR®: TECHNOLOGY

Department 1: Manual Job Creation



Departments 2 and 3: Automated Job Creation

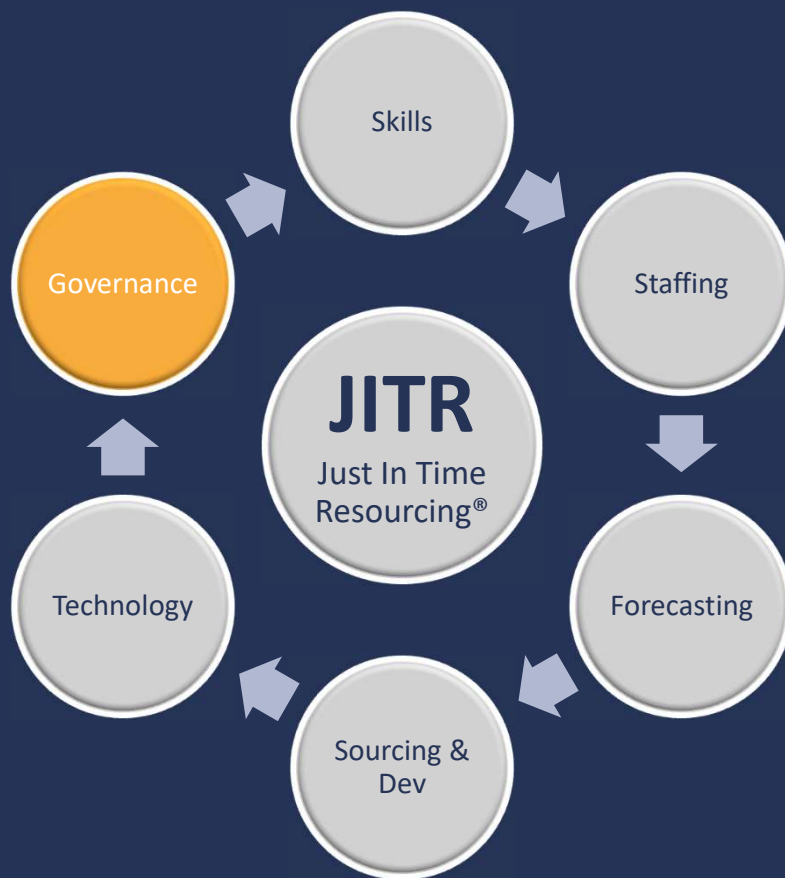


Rounding JITR®: TECHNOLOGY Decisions/Actions/Charter Excerpt

1. IT will create, link, and suspend jobs annually. REM to work on timeline for more efficient job creation/rolling.
2. REM will roll schedules, perform analysis and make updates 9 – 12 months in advance.
3. PSA edit access will be restricted to REM.

Objective	KPI
Technology	
Integrate technology solutions that support resource tracking, skills management, and scheduling needs to create a seamless REM experience.	Identify and enhance systems integration as required.
Ensure systems are updated and operating efficiently.	Attend/participate in relevant technology vendor meeting(s) as scheduled/necessary.
	Liaise with IT to test technology vendor updates, as needed.
Develop automated workflows for routine tasks, allowing REM to focus on strategic and high-value activities that impact utilization and employee engagement.	Demonstrate process improvement with innovation/automation.

Rounding JITR®: GOVERNANCE



Rounding JITR®: GOVERNANCE

PRACTICE

Governance: RMQ Role (partial excerpt from RMCP® Program)

- Develop and implement policies, processes, roles, responsibilities
- Collect and maintain data
- Run reports & analyze data
- Coordinate, facilitate and/or participate in meetings
- Complete meeting action items
- Drive compliance and participation
- Identify process improvement opportunities

© 2007-2019 RTM Consulting, Inc. / RMI. All Rights Reserved.

12

PEOPLE

Defining RM Governance and Metrics

Governance is the infrastructure and process to monitor and control all other Resource Management functions

Metrics help the governing body (RMO) provide direction that is based on defined goals and an evaluation of metrics.

Developing RM performance metrics usually follows a process of:

1. Establishing critical RM processes to meet enterprise RM needs
2. Identifying specific, quantifiable and desirable outputs from RM process execution
3. Establishing targets against which results can be scored

© 2007-2019 RTM Consulting, Inc. / RMI. All Rights Reserved.

6

Metrics to Consider for Resource Management

Common Metrics

Effective Metrics and Governance for the RMO

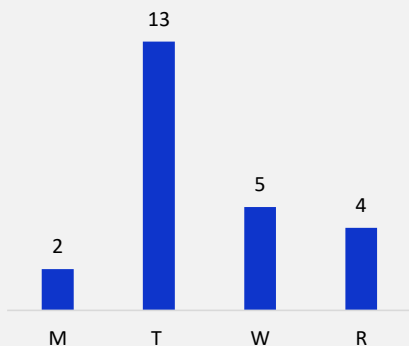
- Utilization: billable or productive – be sure to use 2080 as your denominator
- Forecasting accuracy – we all need to know what capacity we will need
- Project mobilization interval – important to customer satisfaction and responsiveness (internal and external)
- Skills database currency – supports automated staffing well if the data is kept current
- Time tracking – do you really know where all the time goes today? Spent on the right things?
- Employee retention - the RMO can play an important role in employee engagement and retention

Rounding JITR®: GOVERNANCE

Staffing Meetings



- 24 meetings
~35 hpw



Training/Ed



- PSA, Workflow
- Skills
- Reporting

Committees



- Talent Augmentation
- Data Integrity
- Survey Selection
- SteerCo Charter

Maintenance



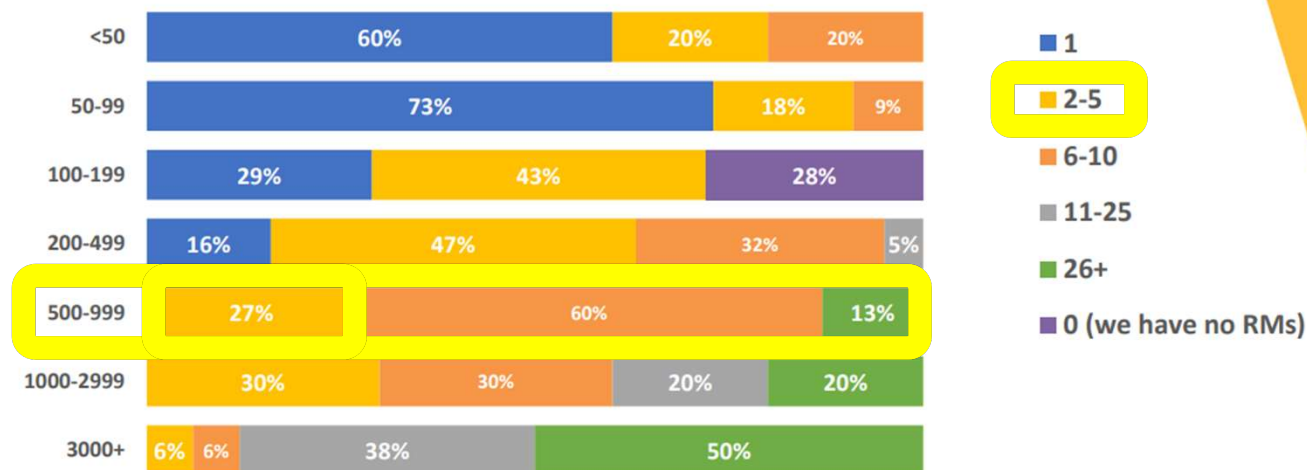
- PSA Maintenance
- Job Scheduling and Rolling
- Reassignments

Rounding JITR®: GOVERNANCE

Analysis: Number of resources vs. number of Resource Managers in organization

of resources in organization

of Resource Managers



There are many variables that drive the right balance of investment in RMs relative to the overall delivery population they are expected to manage. Those variables include but are not limited to: project turnover, project complexity and size, organizational RM maturity, product or portfolio makeup, geographic dispersion and more.

Rounding JITR®: GOVERNANCE

Governance Elements



Rounding JITR®: GOVERNANCE REM Practice

Objective	KPI (or purpose)	Related Competency
Skills		
Develop a standardized skills database for role definition and competency tracking. Evolve to a strategic, centralized system that aligns skills with organizational goals.	Align integrated skills data across Human Resources (HR) and delivery systems to balance the goals of the firm, our clients, and our associates.	Client Experience
Staffing		
Develop a centralized, technology-enabled model that anticipates demand and balances employee satisfaction with business needs.	Integrate scenario planning to support automated staffing processes for resource assignments.	Client Experience
Forecasting		
Establish a consistent approach to resource demand visibility, from minimal forecasting to high-confidence data-driven projections.	Establish and maintain a forecasting interlock* (The process of continuously reviewing, validating, and preparing for the potential opportunities and/or projects that are in the pipeline.) process between the Department (AFR/PS) and Rehmann Corporate Services (RCS) teams (REM, HR/Recruiting, Finance, etc.) for accurate forecasting and data-informed decision-making.	Financial Performance
Sourcing & Development		
Create a proactive and collaborative talent management strategy to fill skill gaps and meet evolving demands, from initial hiring support to a fully integrated recruiting and development plan.	Develop and maintain long-term talent strategy, including warm-pool* (strategy of peak load planning, it is the process of continuously recruiting for the most common resources needs.) recruiting, third-party partnerships, and employee engagement initiatives.	Communication
Technology		
Support an enterprise-wide application that supports real-time resource management functions.	Integrate Customer Relationship Management (CRM), Human Capital Management (HCM), Enterprise Resource Planning (ERP), and Business Intelligence (BI) tools for strategic insights and data-driven decisions.	Client Experience
Governance		
Establish clear, accountable KPIs and continuous improvement practices, including headcount (H/C)* (total # of associates aligned to each Resource Experience Manager) balancing.	Establish comprehensive governance with real-time analytics, robust performance metrics, and processes to drive organizational success.	Financial Performance
Regularly review governance structures to align with the organization's evolving needs.	Together with SteerCo, review progression along the Resource-Management-Maturity-Model.pdf . and update charter, accordingly.	

Rounding JITR®: GOVERNANCE REMembers Decisions/Actions/Charter Excerpt

1. Define and document REM policies related to skills, staffing, forecasting, sourcing & development, and technology.

Objective	KPI
Governance	
Ensure accountability with a focus on continuous improvement and adherence to strategic objectives.	Track and report progression along the Resource-Management-Maturity-Model.pdf .

Refueling Feedback

The presentations and discussions highlighted the REM team's collaborative and feedback-driven approach, emphasizing in-depth discussions around the JITR® wheel. Key points included:

Collaboration & Feedback: The REM team actively sought input rather than making unilateral decisions.

Focused Discussions: Detailed exploration of each component of the JITR® wheel, particularly around staffing and forecasting, led to a consensus on best practices.

Methodology and Prioritization: Despite initial challenges in grasping the methodology, SteerCo aligned on strategies to unify different staffing approaches and emphasized decisions impacting the whole team.

Process Improvements: Emphasis was placed on consistent PSA data entry, firm-wide scheduling benefits, and open, ongoing discussions about both challenges and benefits.

Recommendations: REM expansion across departments, while continuing to educate, uphold best practices, and explore resource sharing.

Individual Insights: Maintaining updated skillset documentation was stressed, and there was strong support for REM's direction, and a shared pride in 2024 accomplishments.

"For Beth, I would encourage her to continue to be confident in her expertise in resource management. While we need the input and buy-in from firm leaders, Beth has the training and expertise in resource management...we do not. We hired Beth because of that expertise." See also: "What if Beth is right?"

Lifting Lessons

Outstanding: 🏆	Developing: 🌱
Debriefed with Innovation and Change Management Director after each SteerCo meeting.	
Meet with the lead stakeholder (DD) and REM for alignment. Ask for SteerCo member suggestions.	
Present summary to department principals. We emailed changes, and I was a guest presenter on a quarterly webinar. We posted the roadmap and charter on our REM Sharepoint.	Present subsequently to SMs – intern/staff – maybe during departmental trainings.
I developed most of the presentations; the REM team took minutes, and I provided a summary of the previous meeting at the start of each subsequent session.	Ask/lean on/empower aligned REM to create/organize content and email summary/actions/impacts after each meeting.



2025 **RESOURCE
MANAGEMENT**
GLOBAL
SYMPOSIUM

LEARN. COLLABORATE. INNOVATE.

Thank You!

Q&A

