



Resource Management Institute

a part of **Belcan**

Q2 Power UP

Capture, Perfect, Automate - Getting Demand Right

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Why Demand Data Matters

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Capture: Getting Complete Demand

03

Perfect: Improving Data Accuracy

04

Automate: Scaling Demand Mgmt.

05

RMI Learning & Events

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Your Call to Action



We want to hear from you!

**Please send questions via
Zoom Q&A icon.**

**We will address questions
offline following the event.**



Greg Hensley
Director
Resource Management Institute
RMCP®

Greg is recognized leader in resource management, known for applying strategic workforce practices in the financial services industry. He currently services as Director of the Resource Management Institute (RMI), where he consults, leads technology partnerships, and instructs the Resource Management Certification Professional (RMCP®) program.

Prior to joining the RMI, Greg was Resource Management Director at a leading enterprise technology firm, where he developed the resource management office and led a robust delivery partner network. A frequent speaker at industry events and webinars, Greg shares insight on resource management practices, maturity and technology adoption.

Greg holds an MS in Information and Communication Sciences and BS in Management from Ball State University.

Dedicated to the advancement of resource and workforce management thought leadership, best practices and standards. Our purpose is to elevate how the world plans and manages its people.

Methods



Best Practices and Standards

Leveraging the Just-in-Time Resourcing (JITR)[®] framework to enable efficient, scalable, and real-world implementation of best practices.

INSIGHTS



Market Research

Providing actionable market research and benchmarking data to empower organizations to assess performance, identify trends and gaps, and drive continuous improvement.

COLLABORATION



Industry Events

Collaborative events and forums that connect resource and workforce management professionals, foster knowledge exchange, and inspire collective growth.

EDUCATION



RM Training and Certification

Equipping individuals and teams with the skills, knowledge, and confidence to lead and execute resource and workforce management at the highest level.

ADVICE



RM Advisory Services

Enabling organizations to build their resource management capability or accelerate their journey to a mature RM function in pursuit of RM excellence.

ESTABLISHED IN 2016

Getting Demand Right

Just-in-Time Resourcing® (JITR)



Cornerstone for Decision Making

Demand data is crucial for allocating resources, forecasting revenue, and business planning



Benefits High-Quality Data

Accurate demand data enables proactive planning, better prioritization, and confident forecasting for leaders



Impacts Business Outcomes

Improved demand data quality directly enhances revenue, customer satisfaction, and employee engagement

How messy is your demand pipeline?



Incomplete demand intake

Low confidence in demand inputs

Multiple versions of demand

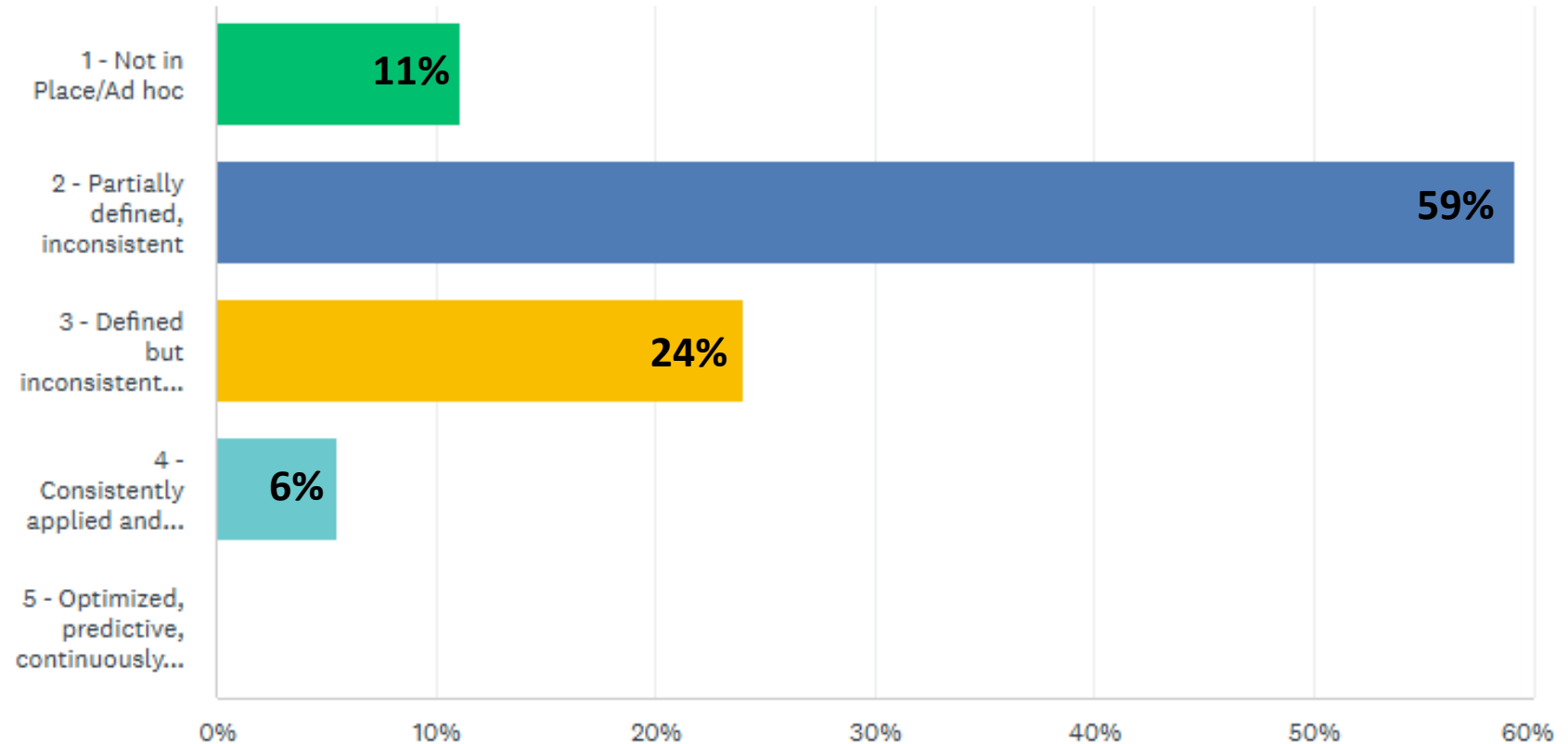
Poor role/skill definition

Weak process ownership & governance

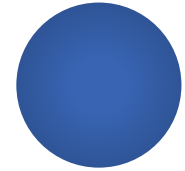
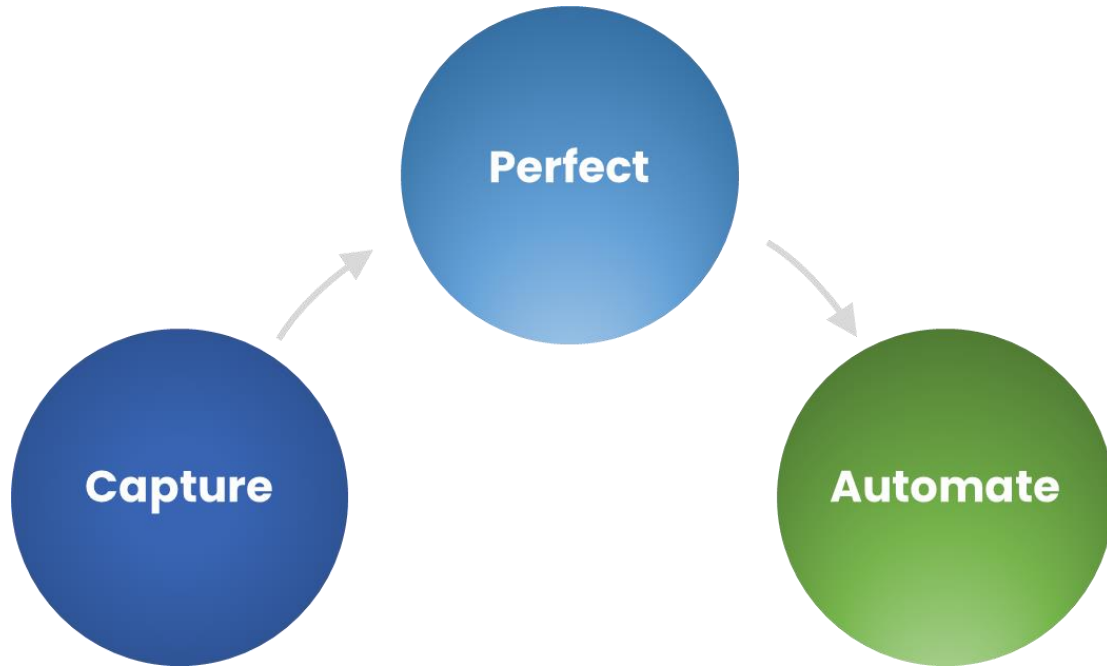
Lack of accountability

How reliable, timely, and trusted are the demand signals feeding your forecast?

RMI Capacity & Forecasting Assessment

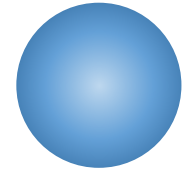


Solution: Establish Demand Data Lifecycle



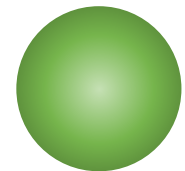
Capture

Clearly identify who owns and is responsible for the data? Is it realistic?



Perfect

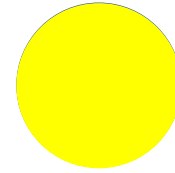
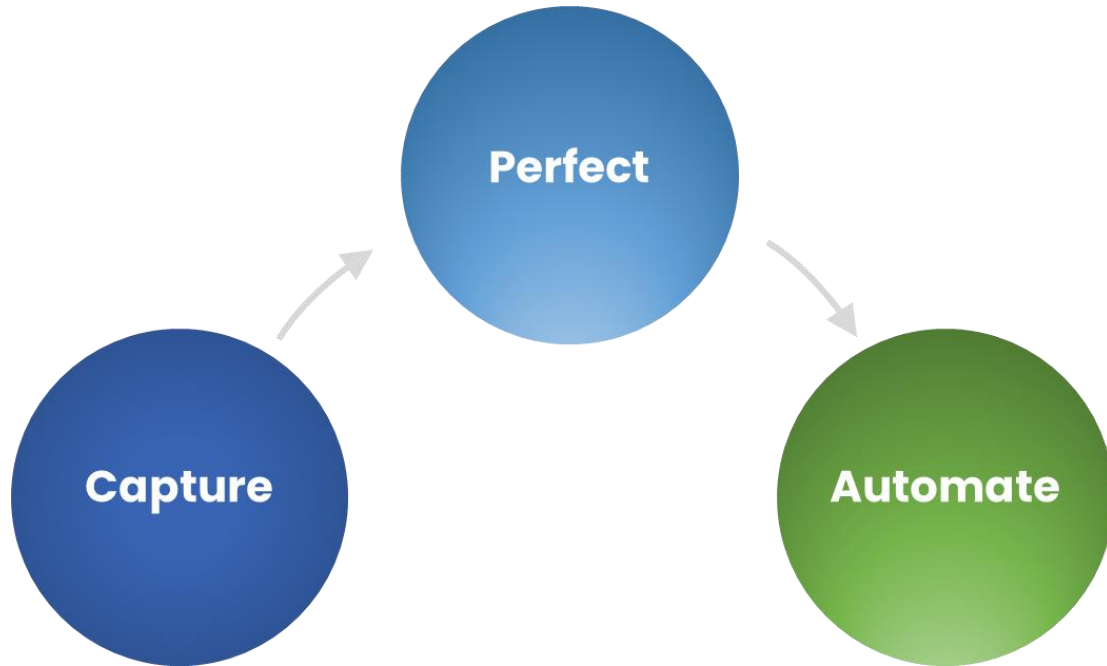
Use your process framework to iterate through the data to get it right.



Automate

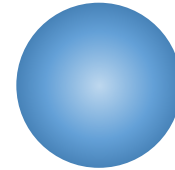
Then, look to automate it through your RM automation tools.

Capture



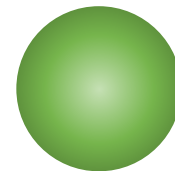
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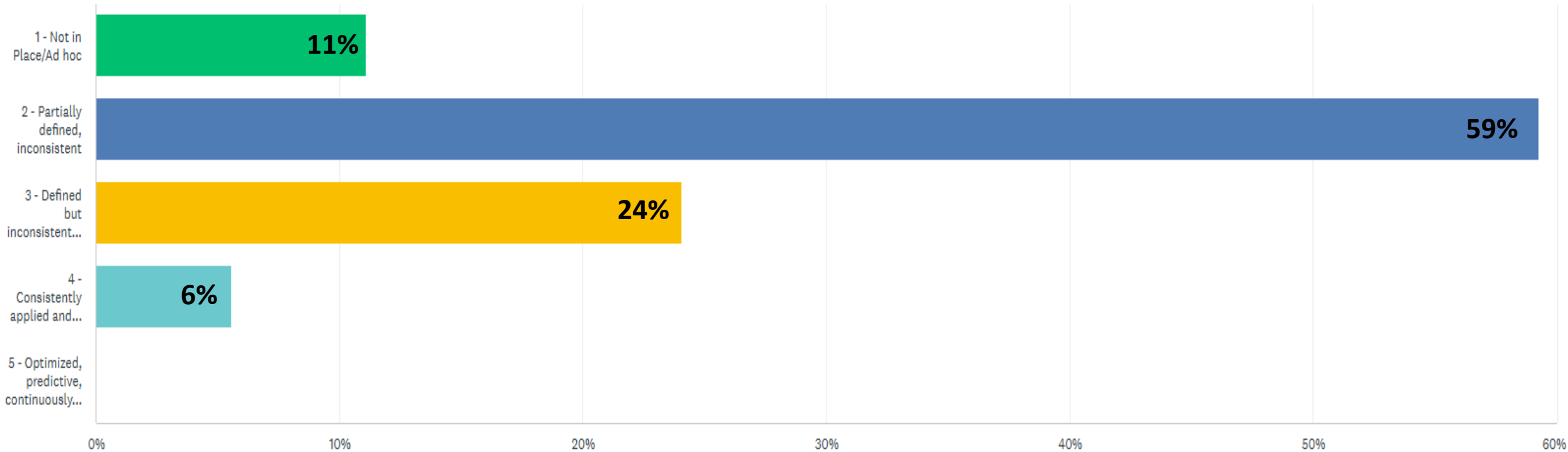
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Automate

Then, look to automate it through your RM automation tools.

How reliable, timely, and trusted are the demand signals feeding your forecast?



Where does essential demand information originate?



What's necessary to get it right?

Activities

- Establish early visibility
- Standardize Intake Process
- Generate Stakeholder Engagement
- Outline Clear Ownership & Accountability

Assignment Data

- Project or Opportunity name
- Win Status and/or Probability %
- Start/end dates
- Role/Skill
- Effort (hours/FTE)
- Practice/Product/Business Unit
- Location/Region/Geo

Engage Stakeholders

SALES
Pipeline-driven demand signals

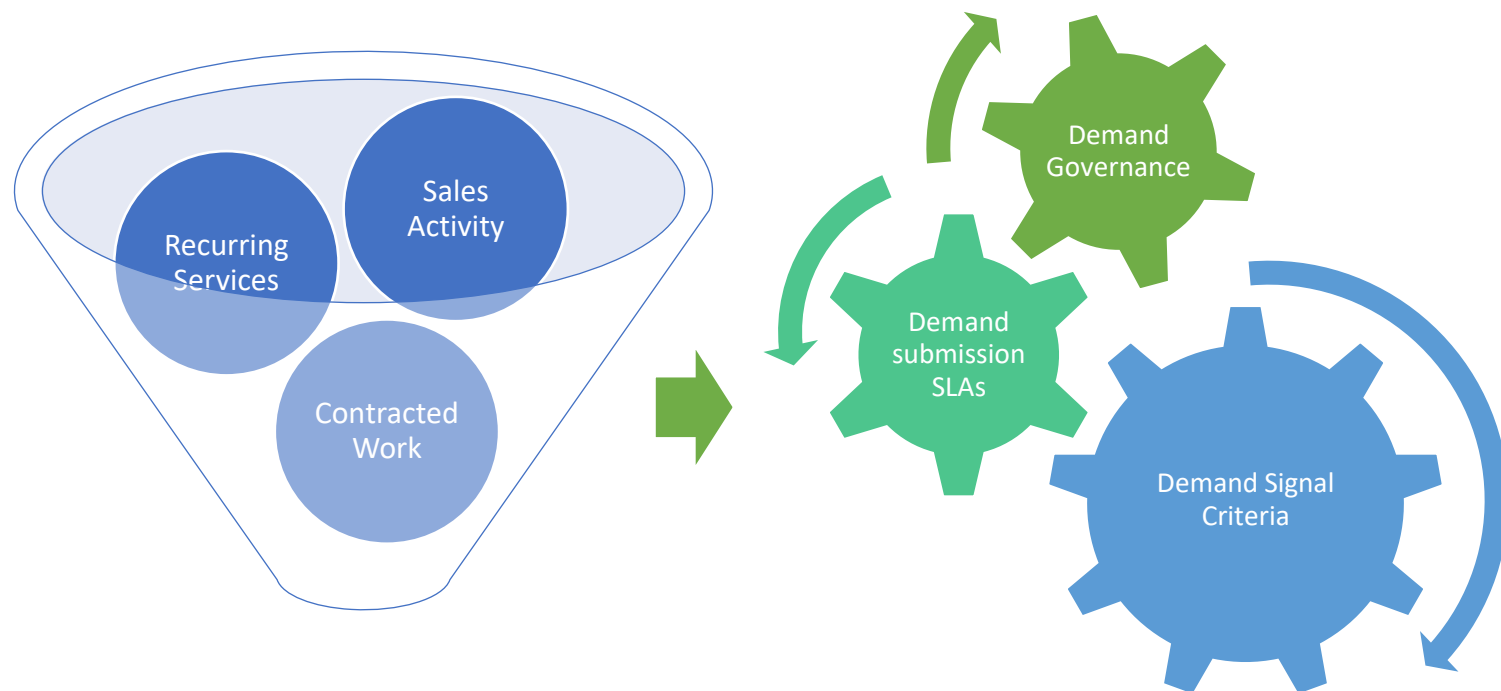
DELIVERY
In-flight project-based demand signals

CS/CRP/AE
Renewals, Expansion demand signals

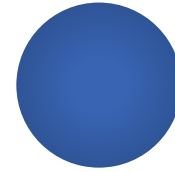
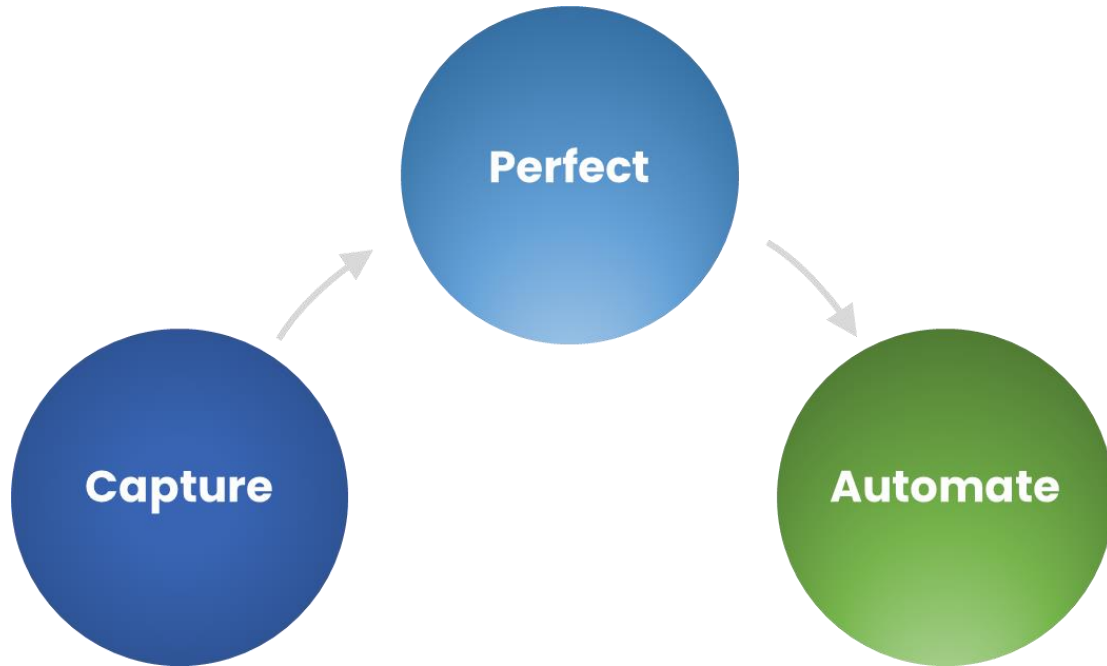
Establish Process

STEP 1: Standardize Intake

STEP 2: Define Criteria & Cadence

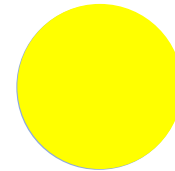


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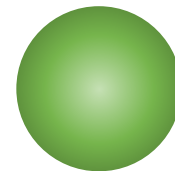
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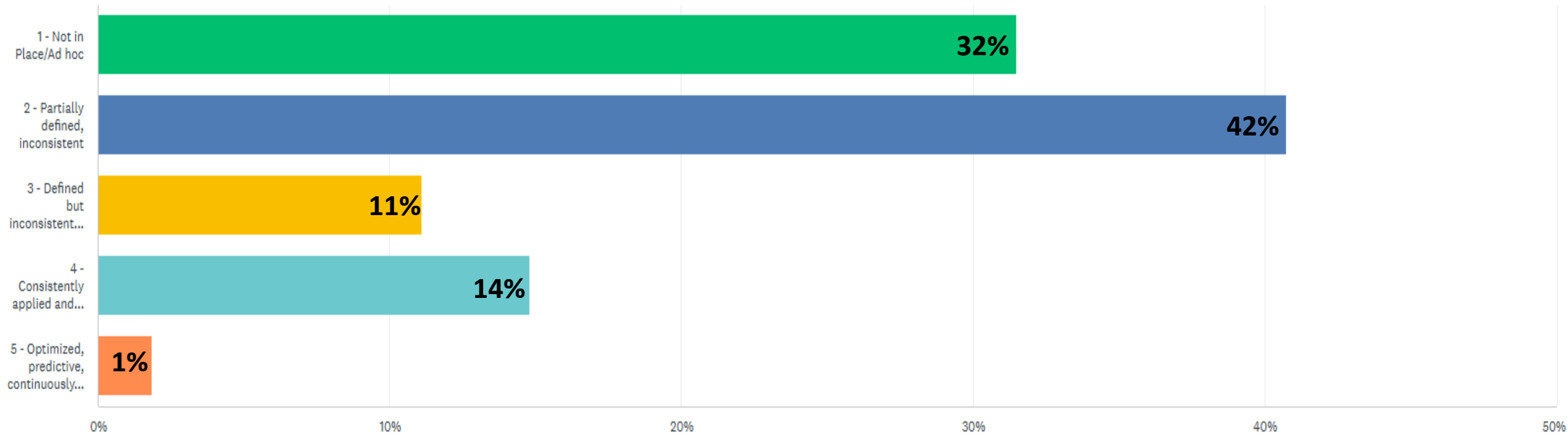
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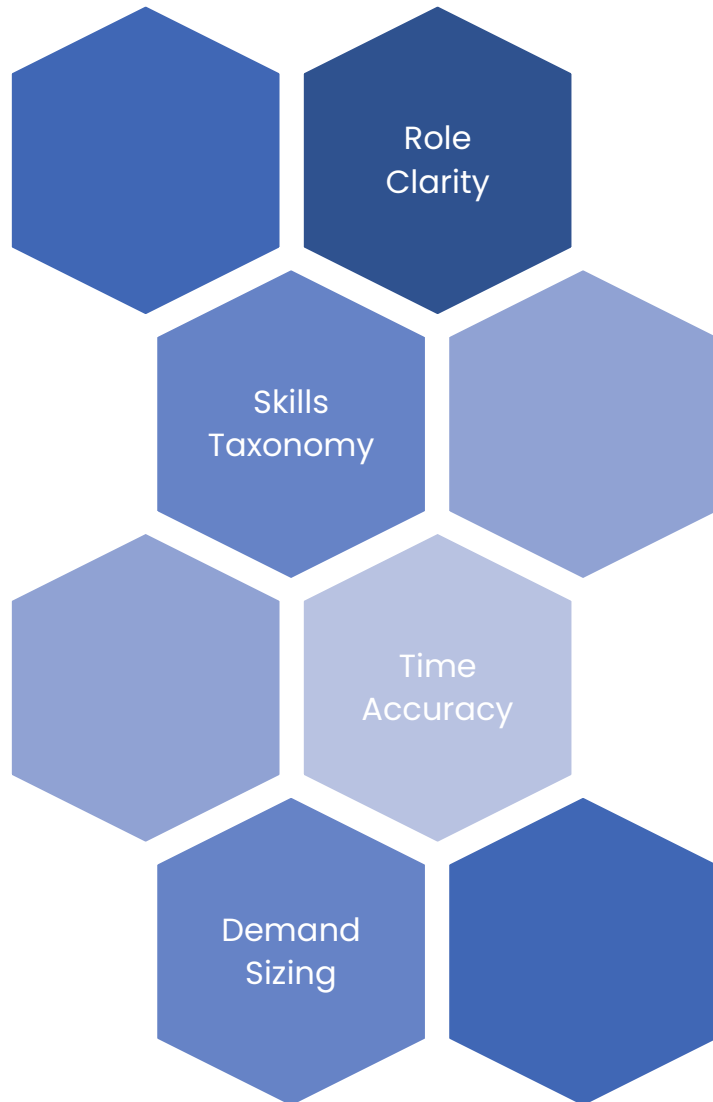


Automate

Then, look to automate it through your RM automation tools.

How consistently do you measure forecast accuracy and use it to improve planning?





Role Clarity

Establish normalized roles

Skills Taxonomy

Relevant skills that define and represent project work

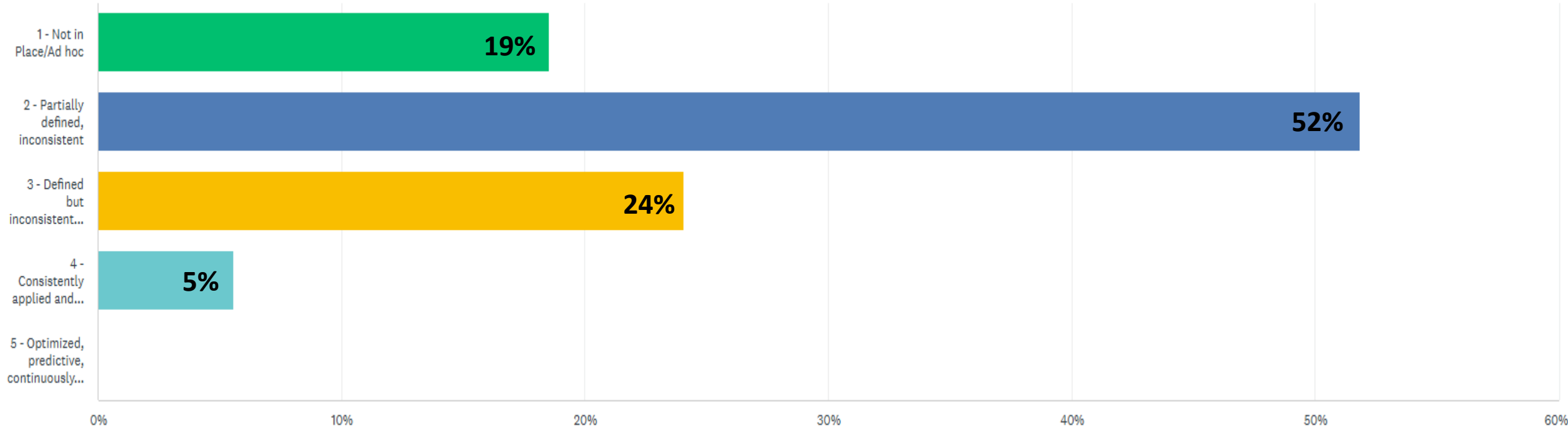
Time Accuracy

Maintain realism around start/end dates of projects and assignments

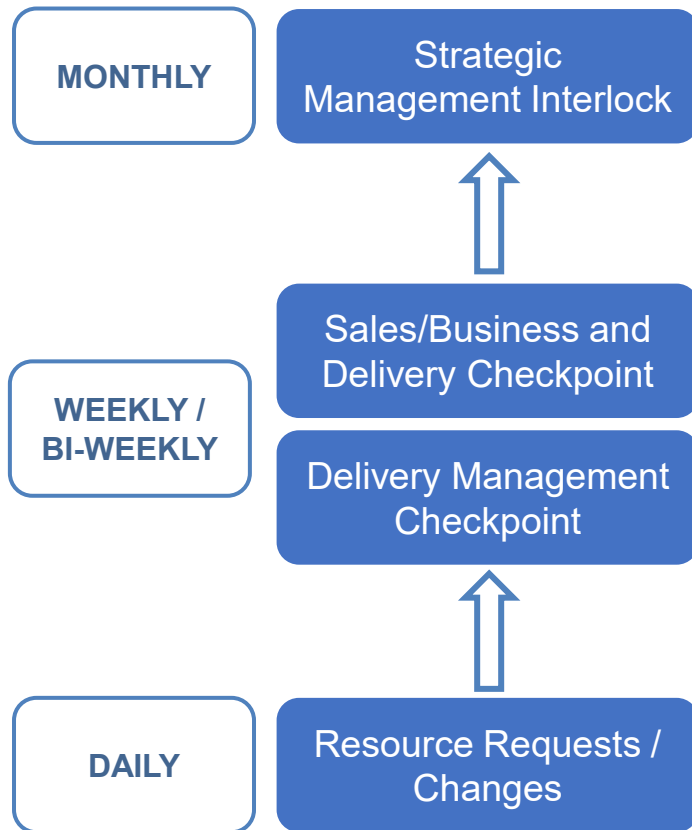
Demand Sizing

Consider level of effort for typical assignment or service. Qualify min hours, short & long term assignments

How accurately can you forecast demand and capacity data by time period?



Interlock Framework



Interlock Report

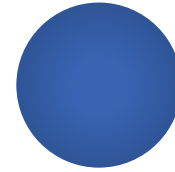
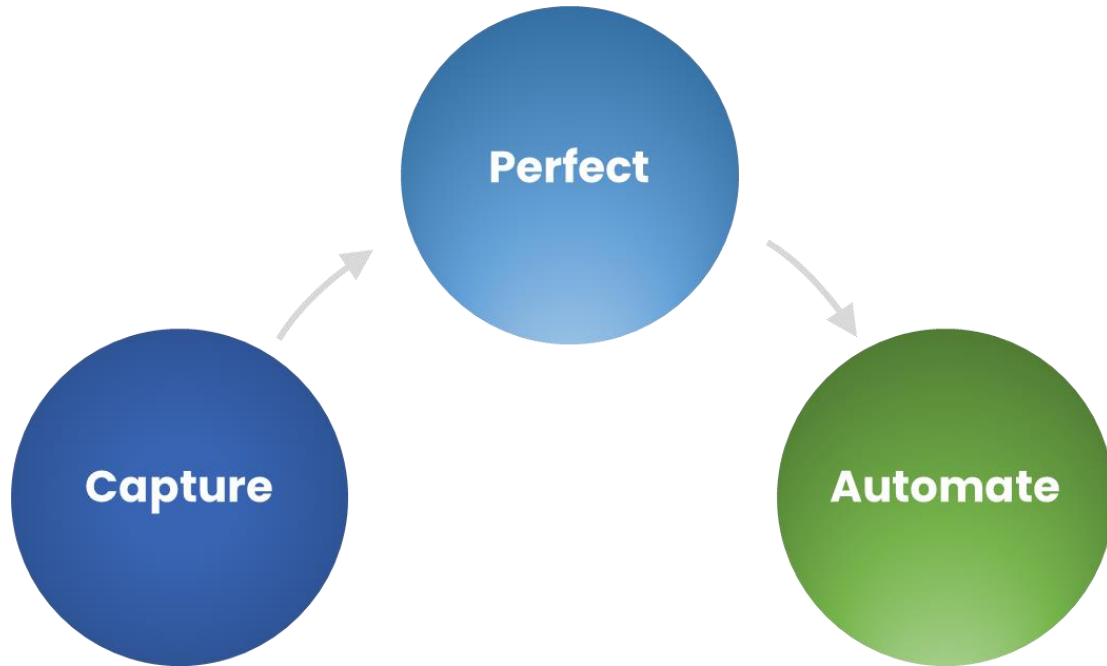
What is it?

- Iterative report used during and as result of Interlock Framework
- Common format for demand reporting, typically aggregated by Practice/BU/Product
- Rolls up Demand into gross FTEs needed. Can be shown at role & skill level too
- Inclusive of recurring/run rate work

How is it used to perfect demand data?

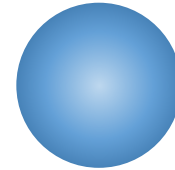
- Vessel for RM to gather demand data insights from multiple levels and dimensions of organization
- Verify high probability opportunities from demand sources
- Examine in-flight work for CR related demand
- Real-time updating at each check-point

Automate



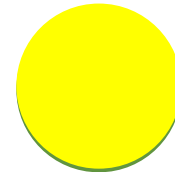
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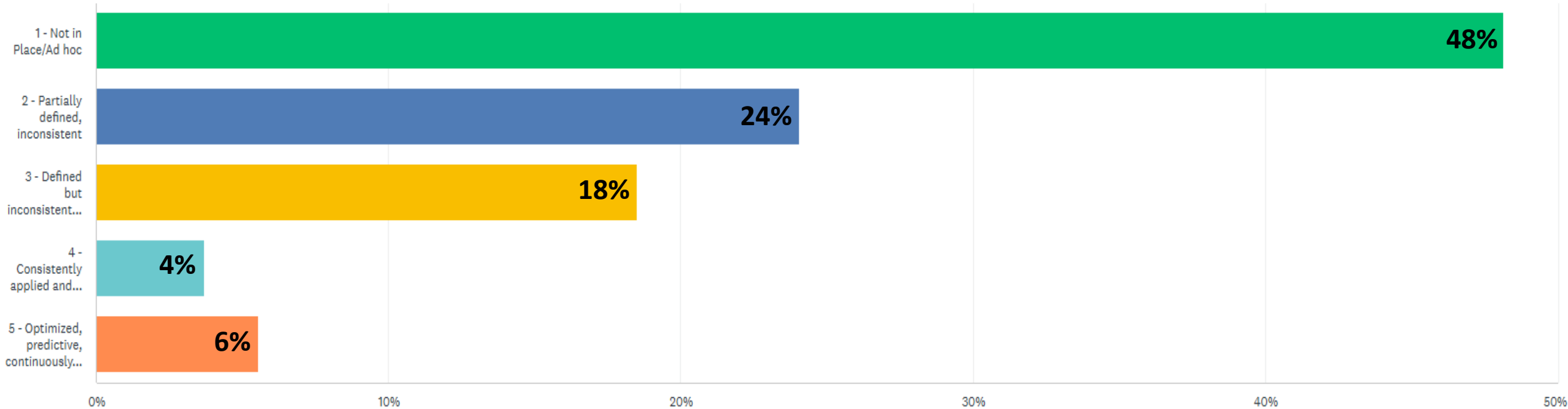
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Automate

Then, look to automate it through your RM automation tools.

To what extent are forecasting and capacity planning supported by integrated purpose-built PSA/PPM/RPM tools?



GOAL: To reduce manual effort, improve speed & consistency and enable predictive insights into demand data

Where do we start?

Demand Intake
Forms, workflows

Data Validation
Assignment data, logic

Notifications
Alerts, Approvals,
Updates

Integration
CRM – PSA – RM Tools

Capture. Perfect. Automate. REPEAT

What's Ahead at the RMI?



**Learning, Connecting and
Strengthening the Discipline**



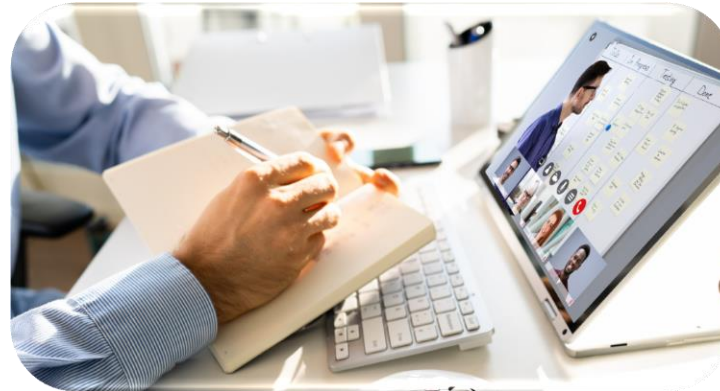
In-Person (Classroom)

- November 3-5 (Cincinnati, OH)



Virtual Instructor-Led (Online)

- Starts July 21 (Tues/Thurs)
- Starts September 8 (Tues/Thurs)



Register Today!



**On-demand version
available 7 x 24**

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<http://resourcemanagementinstitute.com/apply/>



ENGAGE

September 22 and 24, 2026



- 7th Annual Virtual Event
- Delivered in two mini-events
- Features keynotes, topical breakouts and panel discussions
- Back by popular demand: RMI Connections – virtual round table discussions

01

Getting Demand Right is a Discipline

Identify your biggest gap (Capture, Perfect, Automate) and define 1-2 improvements you can implement this quarter. Make sure to engage stakeholders throughout.

02

Invest in Data Quality

Organizations struggle with data completeness, accuracy, and alignment. Obtain better alignment by engaging 1-2 levels of the Interlock Framework and see some wins pile up before expanding data and checkpoint levels with Interlock Report

03

Explore the Intelligence: Use automation strategically, not prematurely

Determine what demand management tools are available with your technology partner. Ensure data perfection is in place, and identify with stakeholders win-win use cases for improving speed & consistency



Thank You!

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