

RMISM Connect

a part of **Belcan**

September 22 and 24, 2026

Strengthen the Discipline.
Advance the Profession.
Engage the Intelligence.



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With Experts
& Peers



EXPLORE

Innovative Ideas
& Best Practices



SOLVE

Today's Challenges
Together



INSPIRE

Action. Impact.
Excellence.





— ENGAGE —

From Scheduling to Strategy

Winning Leadership Buy-In for Resource Management

Sarah Steele, Director of Audit Operations, KSM

Megan Monaco, Audit Resource Strategy Senior Manager, KSM

Agenda

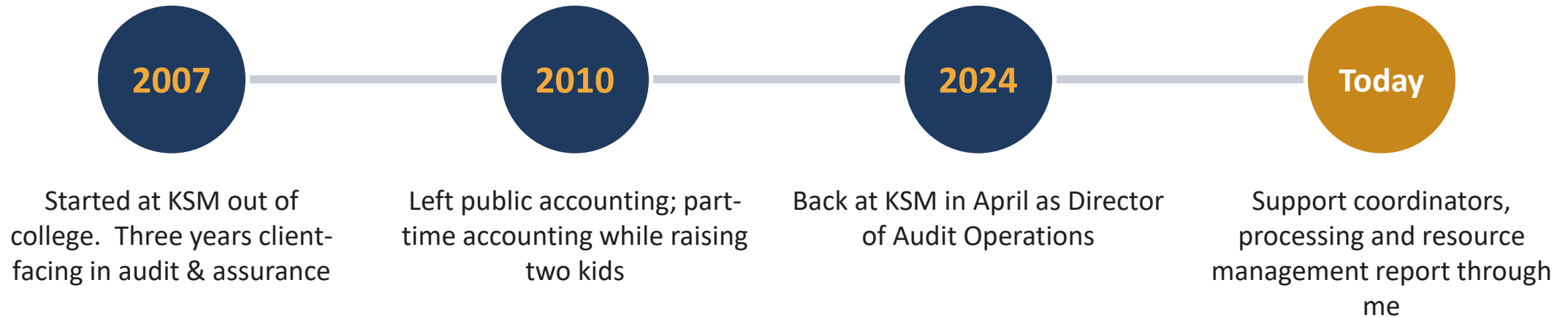
- 1** An unlikely resource management leader
- 2** The reactive reality: 80+ people, 1,200+ engagements
- 3** What it was costing us
- 4** From scheduling to resource management
- 5** Making the case to leadership
- 6** Megan Monaco: the role in action

The background is a light blue and white graphic. It features a world map on the left with several small square icons placed over different regions. On the right, there is a faint image of a computer monitor and keyboard. The text 'I Didn't Come Here for Scheduling' is centered in a large, dark blue font. There are also some binary code strings (0s and 1s) scattered across the lower half of the image.

I Didn't Come Here for Scheduling

An Unlikely Resource Management Leader

A little about me...



Zero resource management experience walking in the door.

The First Thing Every Leader Told Me

- My first weeks: listening tour with every partner and director
- Across the board, the No. 1 pain point was scheduling
- “That’s where we need you to spend your time”...before I understood why
- It took one off-season to see the problem wasn’t the schedule

The Reactive Reality

A Puzzle No One Could Solve

80+

client-facing professionals

1,200+

engagements to schedule

2

full-time schedulers

2x

firm size in five years

- Legacy tenured employee ran the schedule alone for nearly seven years
- Rules existed; however, leaders didn't believe they applied to them
- No reliable way to track wins and losses

Partner preferences, staff preferences, and real capacity rarely agreed.

"I Got a Win... I Think It's March."

A partner passes a resource coordinator in the lunchroom, mentions a new win, and keeps walking.

That was the entire handoff.

The expectation

Remember it, find a team, find a slot

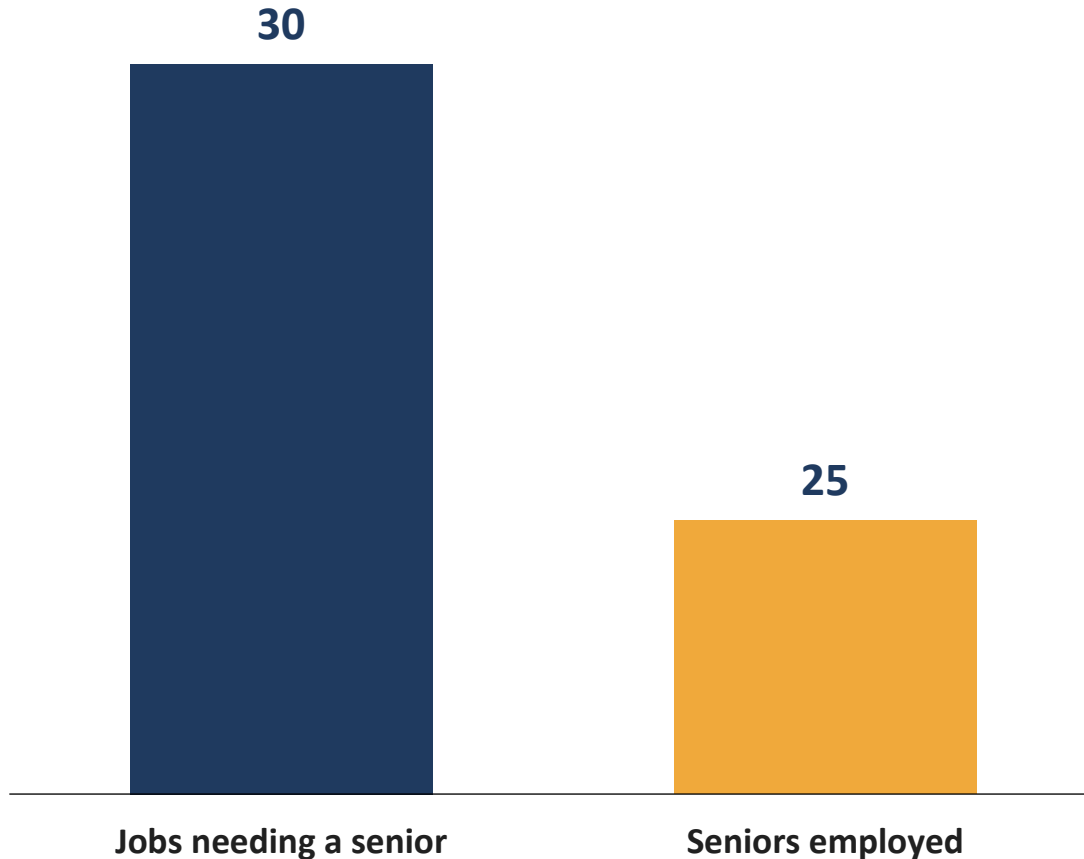
The inconsistency

Some partners wanted zero involvement, others every detail

The verdict

Not sustainable, and nowhere close to scalable

A Typical Busy-Season Week



5 jobs

had to give, every single week

- No job runs without a senior in charge
- So jobs were staffed less than ideally or pushed into another full week
- Strongest seniors overworked; newer seniors under-utilized
- Authority to assign sat with scheduling; partners wanted veto power
- Chronic overtime rebuilding the puzzle after every win and every departure

What it felt like

- Every busy-season week was short-staffed
- Partners kept hearing “we don’t have the capacity”
- Scheduling team living in overtime

What the data said

- Charge-hour goals collectively not being met
- More weeks of surplus than weeks of shortage
- On paper, we had enough people

The truth was in the middle: we weren’t short on people. **Rather: we were short on people in January through April.**

And that is exactly where our revenue lives.

Sold in the Fall, Staffed in the Fog

- Partners sell in the fall for work that runs January through April
- They want to lock dates and a team ASAP
- But the busy season schedule wasn't built yet
- We couldn't confirm a team, so we couldn't confirm a date
- Scheduling became the roadblock to bringing in new work

What the partner saw:

Two seniors open that week, so they "claim" them.

What the partner couldn't see:

Six unstaffed jobs competing for those same two people.

Why it mattered:

Well-intentioned help created conflict, rework and mistrust.

The real problem:

Not people. A schedule that was never true in real time.

The background is a light blue and white graphic. It features a world map on the left with several small inset images showing various scenes like a person at a computer, a globe, and a person in a lab. On the right, there is a large, stylized image of a computer monitor and keyboard. The overall theme is technology and global connectivity.

What It Was Costing Us

Partners were turning work away because they were told we didn't have the people.

- Every partner is chasing individual growth goals and expecting the schedule to keep up
- The cost wasn't inefficiency. It was revenue we never booked
- **14,000 hours behind goal. Closing that gap means ~105 more average-sized jobs and approximately \$2.7M in additional revenue**
- That was the moment the goal became clear: a resource management system that is transparent and trustworthy
- Partners should sell with confidence and never have to hedge on staffing

Scheduling Is Not Resource Management

SCHEDULING

- Reactive: responds to what already happened
- Transactional: who is free Thursday?
- Owned in spreadsheets and hallway conversations
- Success = the boxes are filled
- Invisible until something breaks

RESOURCE MANAGEMENT

- Proactive: forecasts what is coming
- Strategic: do we have the right people, in the right place?
- Owned in data, capacity and utilization
- Success = growth and client service goals are achievable
- Visible, trusted and part of firm strategy

I Didn't Ask for a Headcount. I Wrote a Role.

- **Built the role profile first:** day-to-day ownership plus the big-picture strategy I needed tackled
- **Showed the upside:** room and visibility for partners to sell, full utilization of our people, accurate schedules that serve clients well
- **Named my own constraint:** my role was pulling into firm-wide strategy and no longer had capacity for this
- **Made the ask simple:** we are about our people and equipping them well to serve our clients well
- **The answer:** a quick yes. The proposal then became the job description

What I Hired For



Drives the vision

Takes a strategy and runs with it — no hand-holding



Detail to story

Gets into the data, then tells the story it holds



Tech-forward

Innovative; leans into technology to find efficiency



Trusted, not feared

Builds trust with leaders — a friend, not a foe



Firm on process

Shares the why — and says no when it's necessary

Resource management experience was the *icing*, not the requirement.

Megan checked every one of these boxes.

Planning & Forecasting

- All offices under one audit scheduling umbrella
- Rolling forecasts built on wins, losses and seasonal peaks
- Annual workload analysis by office
- Staffing aligned to engagement budgets and revenue goals
- Partner with IT to leverage RM tools

Utilization & Equity

- Weekly monitoring of audit staff utilization
- Identify under-utilized professionals and redeploy
- Equitable distribution of engagements and charge hours
- Balance peak season; avoid excessive overtime
- Manage PTO, PHPs and coverage

Visibility & Reporting

- Early visibility into group capacity for leadership
- Reporting that links scheduling to budget performance
- Granular scheduling: planning, fieldwork, wrap-up
- Continuous process improvement
- Better employee experience, better client service



Megan Monaco

Audit Resource Strategy Senior Manager

Katz, Sapper & Miller

- Joined KSM in late winter 2026 — and hit the ground running
- Dove straight into the data and our existing processes
- Saw it all with fresh eyes and met with our leaders
- Uncovered far more than I ever could have on my own
- Now: her role, how it has evolved, and the impact it is having

Buy-In, Won Partner by Partner

1

Leadership forum

One argument, won once: resource management drives profitability.

9

Indianapolis partners

Nine separate conversations, each judged on a main theme – how can your business be improved/impacted by resource management?

GROWTH

Capacity we can sell against

Knowing what we can take on before we commit to it.

PROFITABILITY

The right level on the right work

How do we help our more senior people with their workloads?

RETENTION

Review data and see where we can course-correct

Over-stretched teams identified during the season or when it's too late—need proactive support

The Data Leaders Already Trust



THE SCHEDULE

What we planned to happen

Easier to pull. Not yet trusted by the people we needed to convince.



THE ACTUALS

What did happen

Harder to work with. Already believed, so the argument stopped being about the data.



THE STRATEGY

Using data/partner insights to custom-develop

Get all data in the scheduling tool, adapt based on feedback, explain plan and timeline, stronger face to face connectivity to get needed info for planning.

January Capacity Business Case

Indianapolis Audit | Scheduled capacity vs. actual charge demand

Net method: Scheduled — Actual

The schedule was built for more work than materialized.

January schedule included 2,938 more hours than actual charge hours, creating capacity equal to 10.7–14.7 full-time staff depending on the weekly goal.

10,085

Scheduled hrs

7,148

Actual charge hrs

2,938

Net unused hrs

Hours view

71% of scheduled capacity converted into actual charge hours; 29% remained unused.



Scheduled capacity: 10,085 hrs

FTE translation

The same hour gap becomes different staffing equivalents depending on the expected weekly production goal.

40-hour goal

14.7
FTE capacity gap

55-hour goal

10.7
FTE capacity gap

Client-level lens

148 clients assessed



Partner takeaway

Demand did not support the scheduled build.

Method: Net variance = total scheduled hours less total actual charge hours. FTE = net unused hours ÷ weekly goal ÷ 5 January weekly buckets.

Source: uploaded workbook analysis

Setting the team up to succeed for 2027



01 An announced reporting line, in writing, before the start date.

02 Recurring calls with all partners and their teams

03 Understanding of jobs to fill/requirements/where flexibility can be

04 Understanding of client prioritization

05 Goal to complete busy season planning by late July 2026 for 2027 (last year we were not finished until end of November)





— ENGAGE —

Questions



— ENGAGE —

THANK YOU