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RM Maturity Stories: CohnReznick





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Jody is the Resource Management Senior Service Line Lead for the Advisory practice at CohnReznick, a firm specializing in advisory, assurance, and tax services. With 20 years of experience in operations, HR, project management, and resource management, she is passionate about process implementation and efficiency.

Currently, Jody leads a global team and has spent the last four years building and leading the Advisory practice's resource management function. She oversees its maturity progression, aiming to become a valued strategic partner to the business. Jody takes pride in leading a high-performing team, identifying teaching moments for development, collaborating with key stakeholders and the other essential partners to the business, and innovating processes that drive impactful results in efficient staffing, achieving utilization goals, and capacity planning.

Most recently, she has collaborated with the Tax and Assurance RM service line leaders to standardize processes to drive efficiencies across the Resource Management Office (RMO), implement a firm wide skills database, and foster a data-driven decision-making culture.

Agenda

- 1** My Background & Insight to CohnReznick
- 2** Resource Management Maturity Level
- 3** Lessons Learned Along the Journey
- 4** Key Takeaways
- 5** Questions?

CohnReznick Overview

WHO IS CohnReznick

Professional
Services Firm

~5000 global
employees

US, India,
Philippines

Three Practice
Areas:

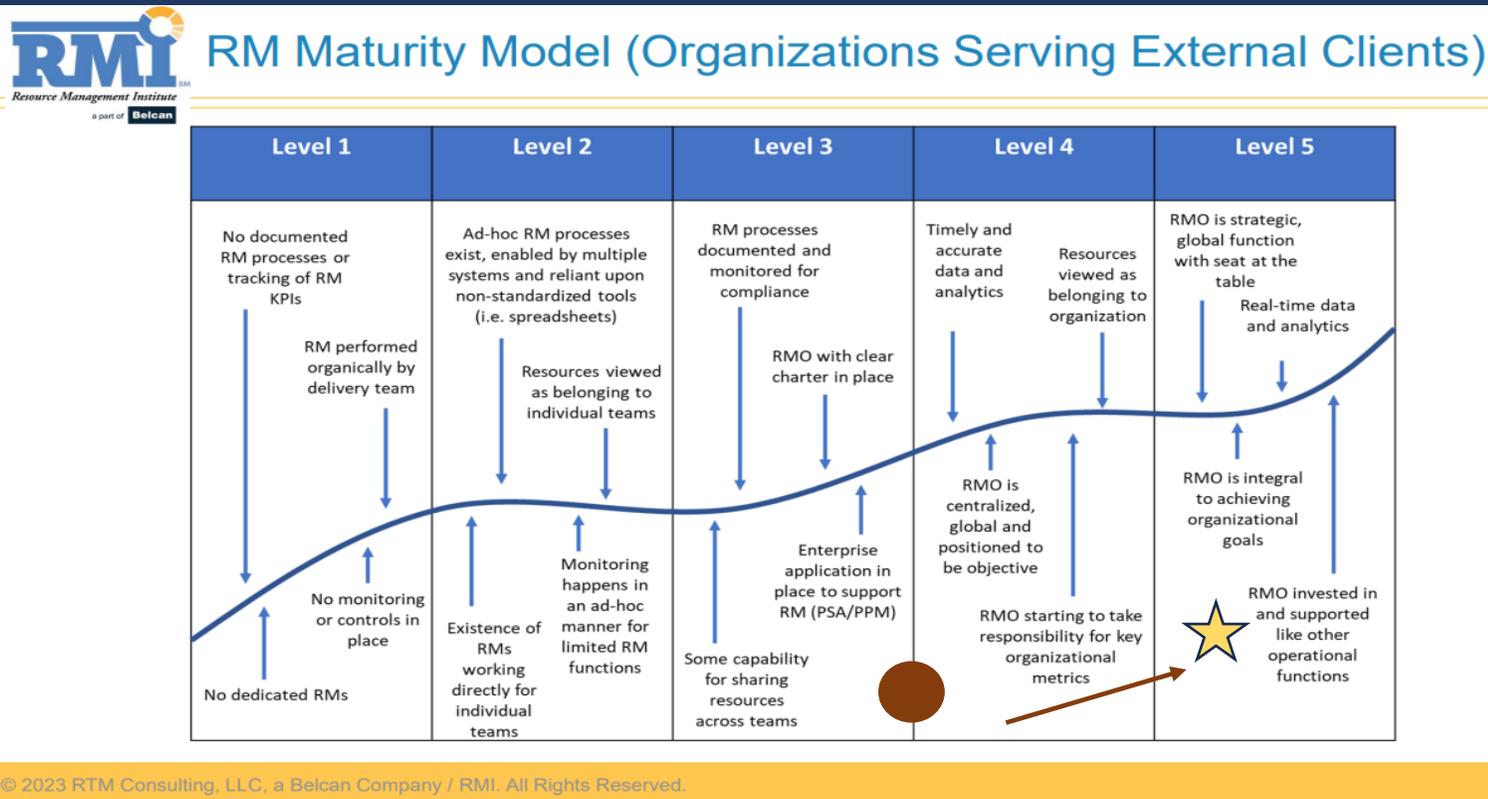
Advisory
Assurance
Tax

Fun Fact:

Partnerships
with the MLB
and Dallas
Cowboys

CohnReznick's RM Maturity Level

- Started RM journey 4 years ago
- 46 global team members, nearly all RMCP certified



● Currently between Level 3 and 4

★ Approaching Level 5 in some areas

Lessons Learned

EFFECTIVE APPROACHES

Started with a structure and leverage model in mind

Built management structure with a director and service line leaders

LESSONS LEARNED

Roles & Responsibilities were unclear

Talent placement didn't align with needs

Leverage model wasn't optimized

OUTCOME

Hires didn't match organizational needs

Insufficient manager coverage

Operational inefficiencies emerged

EFFECTIVE APPROACHES

Prioritized education and relationship building

Conducted roadshow to communicate RM function and value proposition

LESSONS LEARNED

Limited understanding of business needs and goals

Lack of accountability from top leadership

OUTCOME

Implementation was slow and challenging

Faced skepticism about our ability to partner effectively

EFFECTIVE APPROACHES

Identified the need for standardized processes

Able to draw on previous experience

LESSONS LEARNED

Launched without documented procedures or a clear playbook

OUTCOME

Operational Inefficiencies

Ambiguity in roles and responsibilities

Weak accountability

EFFECTIVE APPROACHES

Used manual reporting to generate insights and promote a data driven decision-making culture

LESSONS LEARNED

No consensus on key metrics
Data was fragmented and poorly organized
Lacked a reporting roadmap

OUTCOME

Leadership lacked clarity
Inconsistent tracking
Reports were labor intensive, diverting time from our strategic role
Reporting was slow to implement

EFFECTIVE APPROACHES

Recognized the importance of operating on a unified system to understand skills, properly align resources to work, and monitor capacity

LESSONS LEARNED

Requirements were not clearly defined
IT was not engaged early in the process

OUTCOME

Implementation failed due to misalignment and lack of technical support

Key Takeaways

How Did We Advance our RM Maturity?

Built the Right Team Structure

Established a well-designed leverage model and aligned the right talent

Identified the Superpowers and leveraged

Cultivated a TEAM culture across practices to drive collaboration and shared success

Earned Trusted Advisor Status

Leveraged automated, reliable data to support informed decisions

Standardized policies and procedures for consistency

Partnered closely with the business to understand their business and goals

Made Our Impact Visible

Transformation began when stakeholders could clearly see and feel the value we delivered

Understanding the cause-and-effect of our efforts was a game changer

Worked as One Unified Team

Aligned on common goals and standardized performance metrics

Educated team members to foster ownership and accountability. Success depends on everyone doing their part!

Enforced strong governance to maintain accountability

Committed to Continuous Improvement

Embraced a mindset of ongoing refinement to achieve operational excellence

Thank You!

Questions?