



Power UP

Mastering the RM Charter

March 5, 2025

Thanks to Our Sponsor:

Kantata

Agenda

Mastering the RM Charter

- 01** Introduction
- 02** RMI Perspective
- 03** Featured Speaker: Debra Olson
- 03** RMI Updates



We want to hear from you!

We will either take questions offline or at the end.



Dedicated to the advancement of resource and workforce management education, thought leadership, best practices, and standards

RM Thought Leadership and Best Practice White Papers



Market Research and Benchmark Data



Globally Recognized RM Training and Certification (RMCP®)



Over 4,000 Member RM Community



Industry Collaboration Events

Just-in-Time Resourcing (JITR)® Brand of Global Resource Management



RM Maturity Model



ESTABLISHED IN 2016

Welcoming New Members: Join the RMI



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Collaborate

2025 | April 7-9 | Indianapolis, IN

This is the can't-miss event for resource and workforce management professionals to connect, share insights, and learn how to showcase the VALUE of effective resource management.

[Learn More!](#)

Innovate

Educate

Join Today!



RMI Member Benefits

- Access to RMI insight and white papers on RM best practices
- Access to RM market research
- Invitations to RMI events
- Access to recordings of previous RMI events



RMI Membership



RMGS 2025



RMCP® Certification

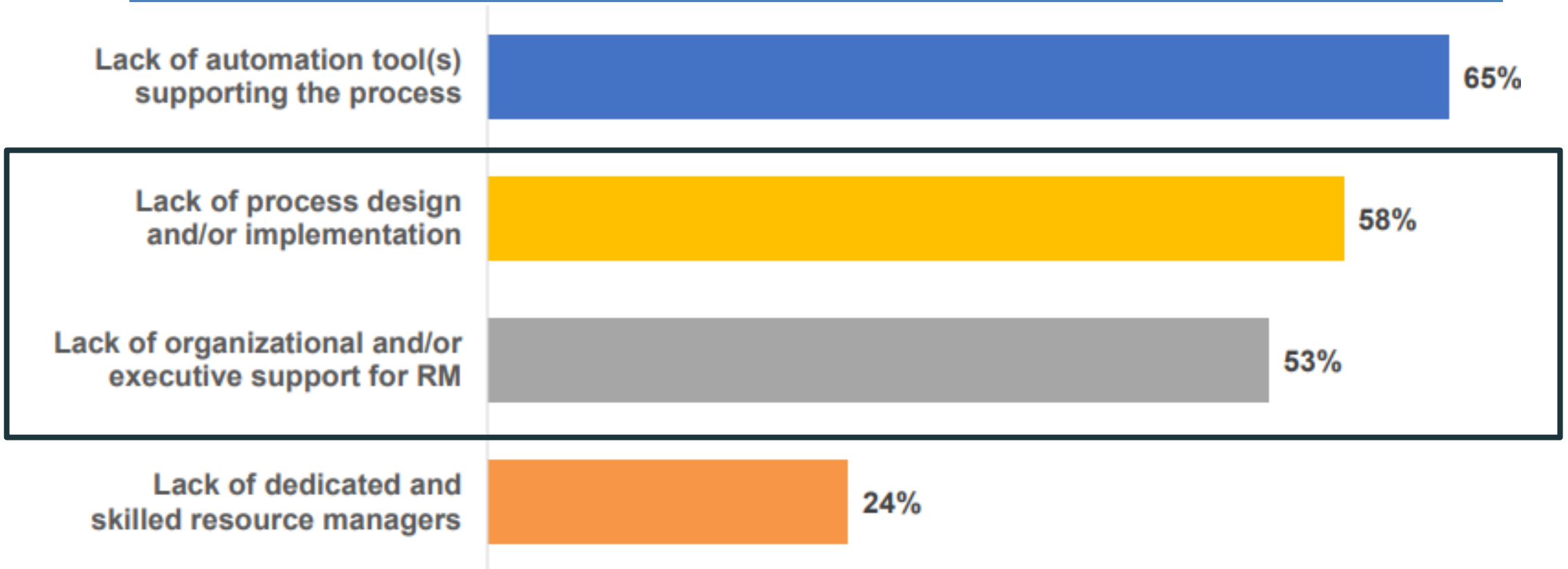
www.resourcemanagementinstitute.com



Mastering the RM Charter

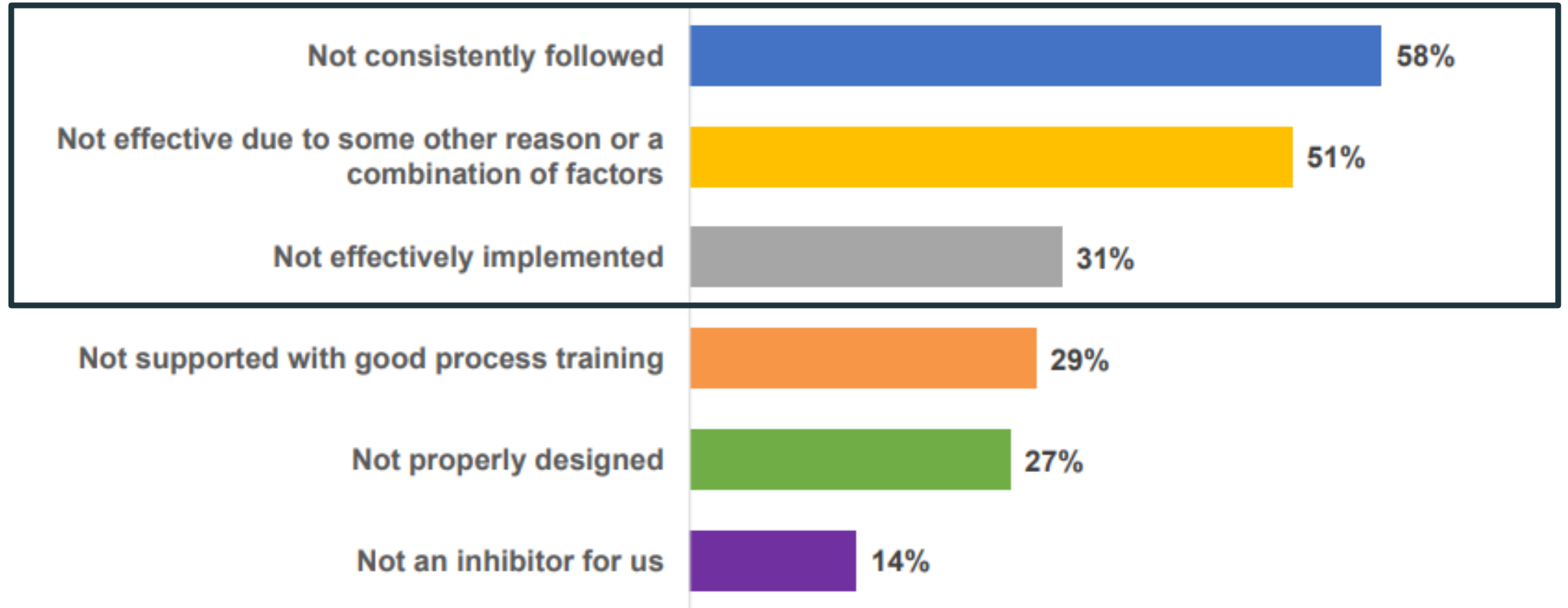
RMI Research Data

Q5. The largest inhibitors we have to effective resource management are due to:
(Check all that apply)*



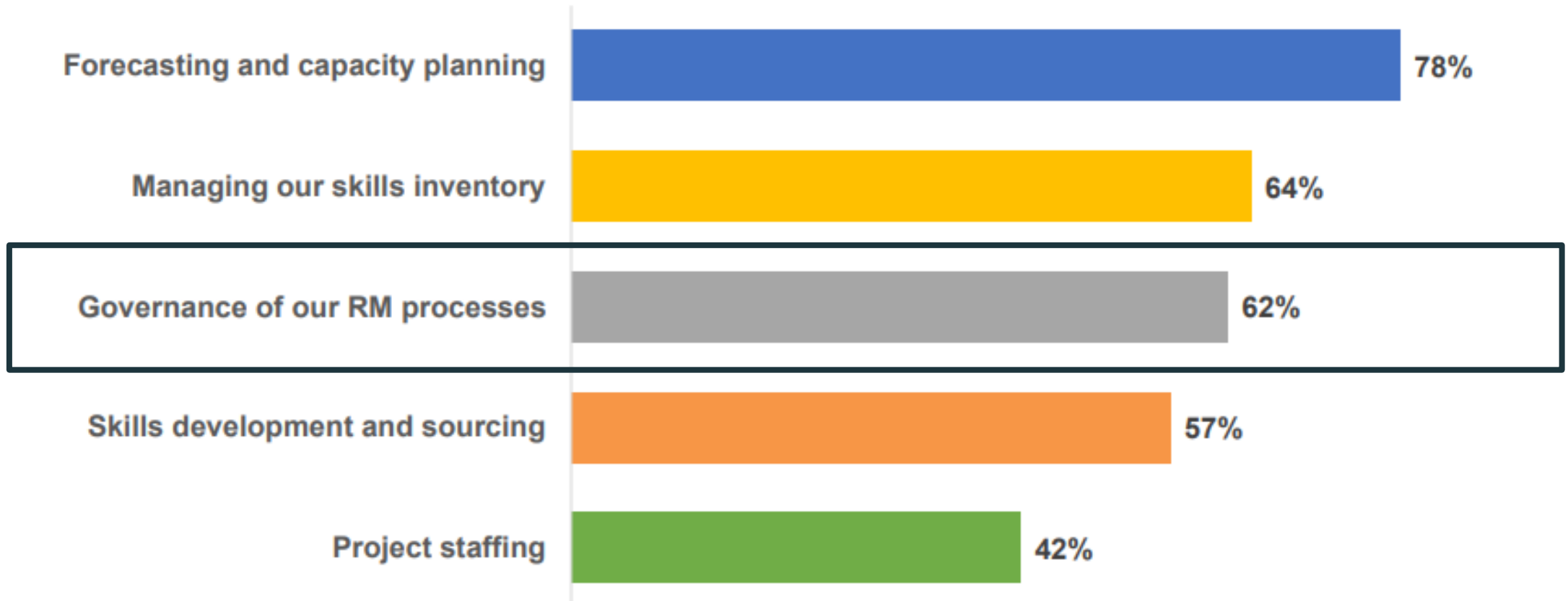
RMI Research Data

Q9. Regarding process support for resource management as an inhibitor, our current RM process is: (Check all that apply)*

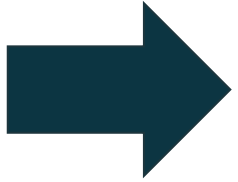


RMI Research Data

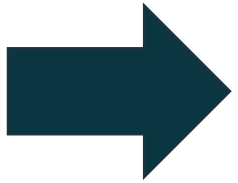
Q10. Regarding process support for resource management, we need/plan to develop better processes for: (Check all that apply)*



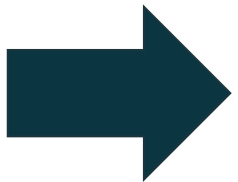
Observations



There is still work to be done to build better adoption and governance of RM processes

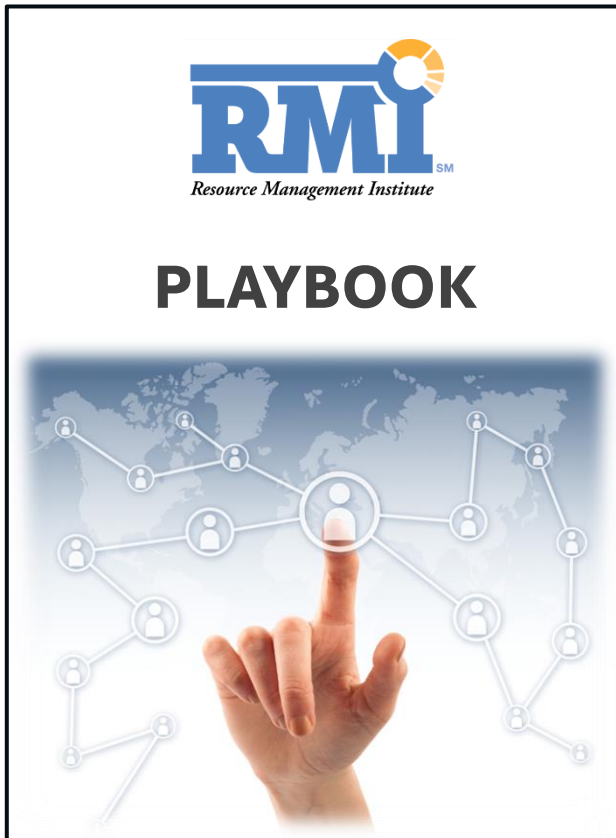


Lack of organizational support is still listed as one of the largest inhibitors to effective RM



Alignment across the organization is crucial to RM success

RMI Playbook



- 01 Secure and cultivate **executive support for RM** and ensure proper organizational positioning
- 02 Build and operate a **Resource Management Office (RMO) with a clear charter**
- 03 Define and adopt an **enterprise Resource Management process with supporting documentation and training**
- 04 **Characterize your supply** with well-defined roles, skills inventory, and profile data managed centrally across the organization
- 05 Use a **proactive staffing process** that balances priorities for project allocations and the need for business efficiency (utilization) with transparent visibility enterprise-wide to all available resources
- 06 Leverage a **robust forecasting and capacity planning capability** to meet the dynamic needs of the business
- 07 Utilize a **sourcing and development strategy** that supports the definition of actions necessary to **align resource supply with forecasted demand**
- 08 **Automate RM processes in best-of-breed technology** that integrates with your technology ecosystem
- 09 Institute a robust **governance framework** to monitor adherence to RM process standards, ensure quality data, and measure RM effectiveness
- 10 Invest in the **ongoing development of Resource Managers**



Debra Olson
Sr. Principal Consultant
RTMC

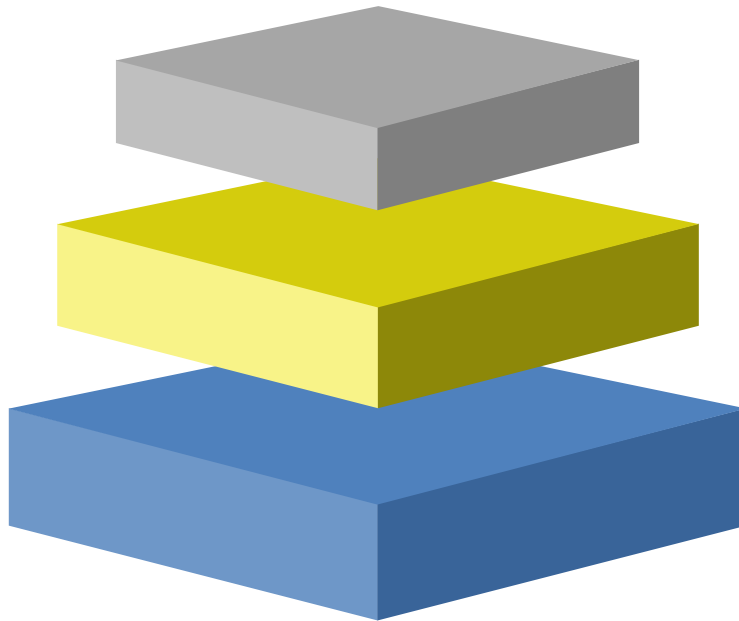
As a Senior Principal Consultant, Debra leverages her 20+ years of business consulting and management experience to help clients improve their PS operations, global resource management functions and PMOs.

Debra works with clients to identify process issues and operational inefficiencies that inform the development of recommendations and strategies to drive improvements and help customers meet their targeted objectives.

She holds an MBA from Montclair State University w/an International MBA Certificate from Groupe Ecole Superieur de Commerce and a BS in Communications from the University of Texas, Austin.

Setting the Stage

A clear charter for your RM function will pave the way for operational clarity and acceptance.



DEVELOPMENT

Spend the time to ensure you are documenting all aspects of your resource management function.



MAINTENANCE

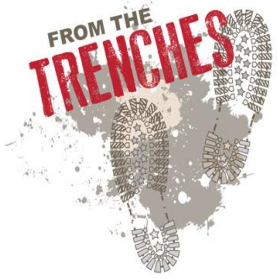
Give some thought to how you will keep the charter up-to-date.



COMMUNICATION

Don't skip this critical step – it can be the difference between acceptance and confusion.

The Importance of a Strong Charter



01

Use your charter to **educate the organization** on the *purpose* of resource management and its value to individual stakeholders and the organization.

02

Align expectations around resource management responsibilities. **Clarify what the RM will and will not do**. This defines how RM(s) will work with the rest of the organization.

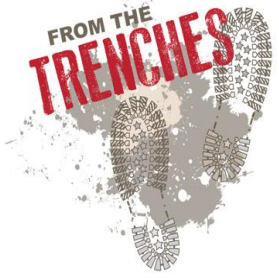
03

Outline key outcomes that will create value and continual improvement and that will be shared throughout the business.

04

Establish that **RM is a Strategic Mindset**. Take your charter on a roadshow to gain organizational agreement and support. **Empower the team** to achieve objectives defined in the charter.

Where Do We Go Wrong



▶ Lack of support and the empowerment necessary to do the RM job.

▶ Your charter is too detailed and looks more like an RM Operations Guide.

▶ Not leaning on the charter as the cornerstone of RM process governance.

▶ Not having a maintenance plan – charters are living documents.



Upcoming Events and Training



2025 RESOURCE
MANAGEMENT
GLOBAL
SYMPOSIUM

April 7 - 9, 2025 • Indianapolis, IN



RMGS 2025

- 6th Annual Event
- April 7-9, 2025
- JW Marriott
- Indianapolis, IN

“Amplifying the VALUE of Resource Management”

First-of-its-kind certified professional skills development program for:

Resource Managers

- 3-day classroom, online instructor led sessions (2 hrs. each), and on-demand format
- Interactive lectures, practical case study exercises
- Certification exam
- RMCP® credential for two years

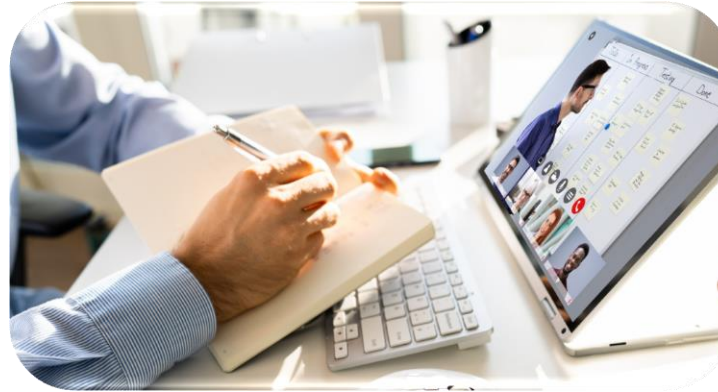


Just-in-Time Resourcing® (JITR)

2025 RMCP® Class Schedule

Virtual Instructor-Led (Online)

- Starts April 22 (Tues/Thurs)
- Starts May 21 (Wed)
- Starts July 22 (Tues/Thurs)
- Starts October 15 (Wed)
- Starts December 2 (Tues/Thurs)



Classroom

- April 7, 9, 10 Indianapolis, IN
- August 19-21 Cincinnati, OH



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

Register Today!



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

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Kantata takes professional services automation to a new level, giving people-powered businesses the clarity, control, and confidence they need to optimize resource planning and elevate performance. Kantata's purpose-built cloud software is helping over 2,500 professional services organizations in more than 100 countries focus and optimize their most important asset: their people.

By leveraging the Kantata Cloud for Professional Services™, professionals gain access to the information and tools they need to win more business, ensure the right people are always available at the right time, and delight clients with project delivery and outcomes.

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Thank You

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