Q4 Power UP

AI in Resource Management

Beeye is an award-winning AI scheduling solution that's revolutionizing Workforce Management and was recently named "Fintech Startup of the Year" by the International Accounting Bulletin. Our solution frees billable hours, enhances employee well-being by automating planning and streamlining task workflows. We're recognized as one of the most innovative companies in Canada by Microsoft.

www.mybeeye.com/en/

Dayshape is a market leading AI-powered resource management software for professional services firms. Through intelligent automation, Dayshape optimizes your workforce like no other platform can, making it easy to ensure your workforce is deployed optimally at all times, no matter how large or complex the scheduling needs. That's why it's trusted by the Big Four and many top 20 accounting firms who are using Dayshape to achieve extraordinary results. Dayshape is defining the future of AI-powered resource management - explore what it can do for your business.

www.dayshape.com

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.

www.kantata.com

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

RM 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 and Benchmark Data

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

COLLABORATION

Industry Collaboration Events

Enabling 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.

ESTABLISHED IN 2016

Ryan Childers
Managing Director
Resource Management Institute

Ryan Childers is the Managing Director of the Resource Management Institute (RMI). With specific expertise in Global Resource Management, Ryan was an early adopter and implementer of the Just-in-Time Resourcing® brand of human capital management solutions. His passion for the resource management discipline is central to his role leading this important industry institute.

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

AI in Resource Management

01 Introduction

02 Discuss AI usage and use cases

03 Things to do right now

04 RMI updates and resources

We want to hear from you!

Please send questions via Zoom Q&A icon.

We will do our best to address questions at the end or offline following the event.

- The RMI has been tracking AI's evolution for years and translating market shifts into RM-specific guidance.

- We've consistently emphasized: AI only works if the underlying RM processes and data are mature.

- PSA/PPM/RPM vendors are embedding AI rapidly. New players are emerging with AI natively built in.

- In a future where AI is poised to take on more transactional tasks, RMs must elevate soft skills and become more consultative.
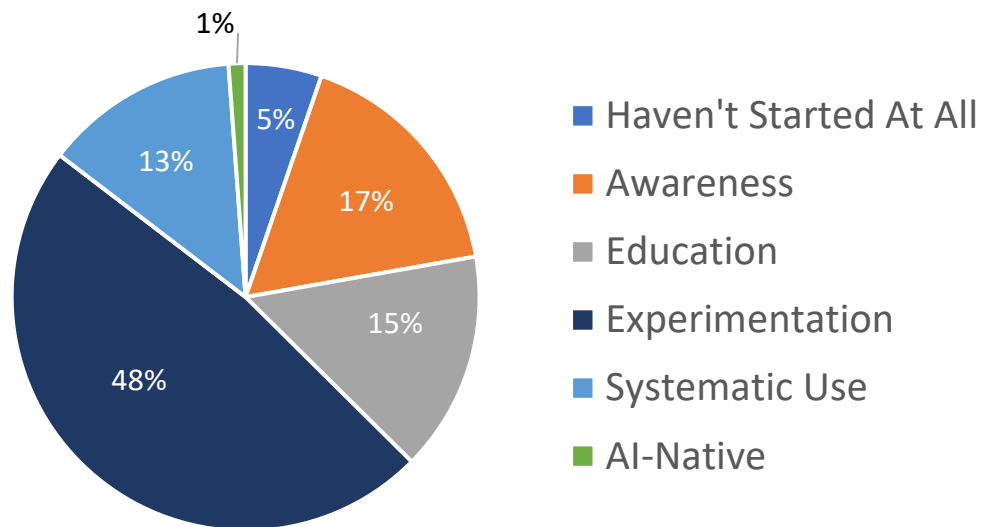
Where are we today?

What did we learn at RMI Connect?

The Evolution of AI Adoption
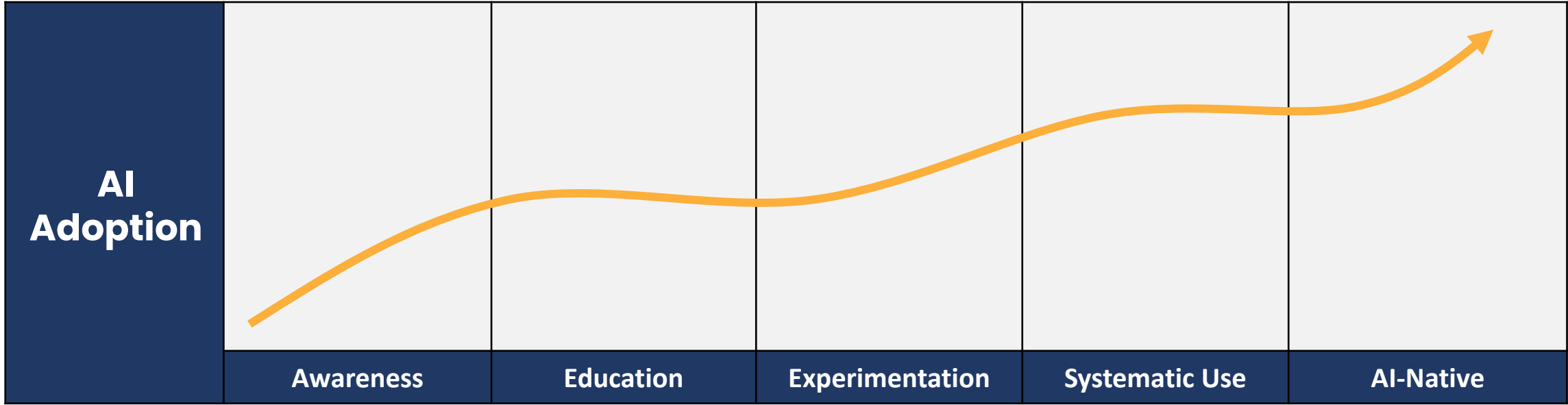
AI Adoption	Awareness	Education	Experimentation	Systematic Use	AI-Native
In Practice	Exposure to AI concepts, tools, and potential.

Curiosity without action. | Learning about AI capabilities, risks, and use cases.

Attending formal or informal training, webinars, articles, etc. | Trying tools like ChatGPT, Copilot, or AI apps.

Use is ad hoc, exploratory, and often siloed. | AI is embedded into workflows or routines.

Teams or individuals use AI consistently for productivity, decision-making, or collaboration. | AI is a core part of how work or life is done.

Autonomous agents, co-creation, and proactive AI support are the norm. |

1 **Where is your organization along the AI adoption curve?**

*Nearly half of organizations are experimenting, but only 14% are using AI systematically.*

Legend:
- Haven't Started At All — 5%
- Awareness — 17%
- Education — 15%
- Experimentation — 48%
- Systematic Use — 13%
- AI-Native — 1%

2 **Where does your RM function sit on that same adoption curve?**

RM is not keeping pace with organizational AI movement.

Legend:
- Further Ahead — 9%
- Lagging Behind — 58%
- Same Stage — 33%
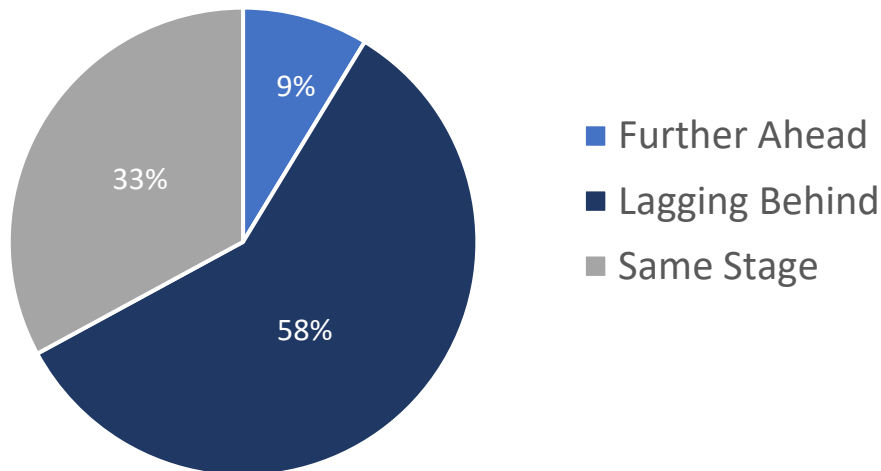
- Lack of organizational AI strategy and/or funding

- Embedded AI tools aren't present yet in your PSA/PPM/RPM tool

- Process and data quality issues

- Unclear use cases, thus not knowing where to start

- Lack of guidelines or governance

- Fear or apprehension of "messing something up"

- RM workflows cross multiple systems and this fragmentation makes it harder to introduce consistent AI than in more siloed functions

- Bandwidth issues — no time to experiment
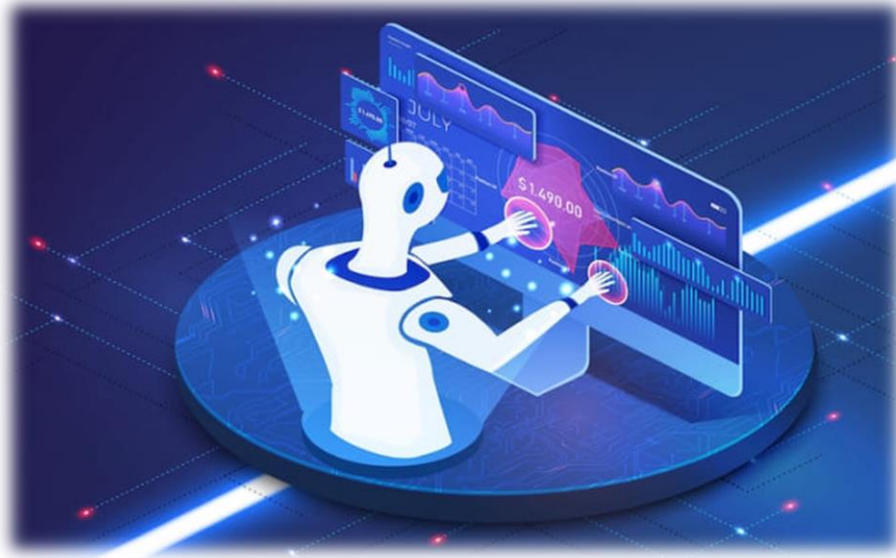
Where does your RM function sit on that AI adoption curve?

- Further Ahead
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33%
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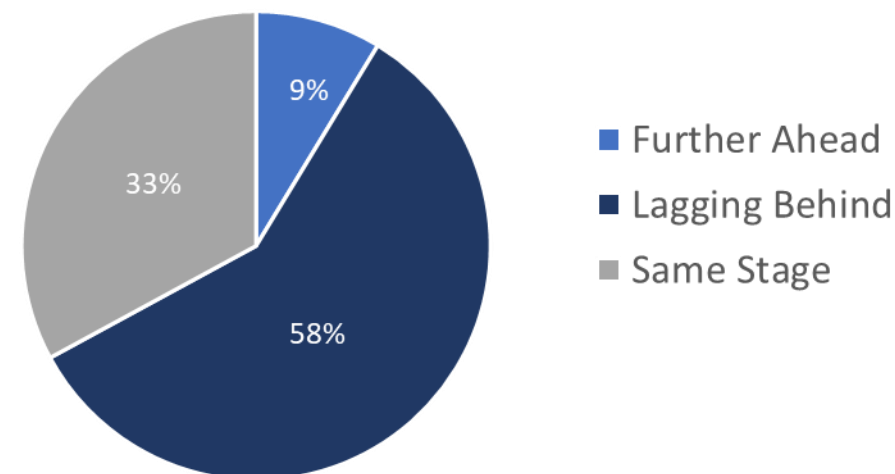
Our Point of View:

AI will <u>enhance</u> the efficiency and effectiveness of Resource and Workforce Management

The Focus of AI Use Cases

Productivity

- <u>Automating routine and repetitive tasks</u> such as interpreting complex data sets, identifying trends, and predicting future outcomes

- Leads to <u>increased efficiency, productivity, and cost savings</u>

What AI Can Do... 👍

- AI can make teams more effective.

- AI can organize information in a fast & precise manner.

- AI can reduce or eliminate repetitive, manual, simple requests.

- AI can be integrated into your daily life to enable working smarter & more strategically.

"Alignus Peopleus! Forecastus Flawless! Chaos Eliminatus!"

Improved Forecast Accuracy	→	More Predictable Delivery
Enhanced Data Quality	→	More Trustworthy Decisions
Increased Skills Visibility	→	More Confident Resource Deployment
Optimized Allocation Decisions	→	More Effective Utilization
Better Reporting & Insights	→	Faster and Better-Informed Decision Cycles
Increased RM Productivity	→	More Time for Strategic Work

This is what AI is capable of doing to enhance RM

Company Level

Across companies, AI is becoming a strategic priority.

Leaders are asking teams to show what they're doing with AI, and many organizations are hosting internal 'show-and-tell' sessions to spark innovation.

The pressure is increasing: AI adoption is expected, visible, and tied to operational improvement and competitiveness.

Promotion and Pressure

Team (RMO) Level

Within RMOs, about half of teams are actively experimenting with AI, but not necessarily through embedded PSA/PPM/RPM features.

A lot of experimentation seems to be happening outside the systems: exporting data, feeding it into GenAI tools, and asking for analysis, summaries, trends, or risks.

Teams are exploring AI in practical, low-barrier, high-value ways.

Practical Experimentation

Individual (RM) Level

Individually, RMs are using AI to boost personal productivity.

RMs are using GenAI tools to draft emails, build presentations, summarize meetings, speed up research, and translate raw notes into clear insights.

These small, everyday efficiencies reduce administrative work and give RMs more time to focus on higher-value advisory decisions.

Personal Productivity

Even "light" usage is meaningful — it supports shifting low-value, repetitive work off RM's plate so they can focus on strategic optimization.

Practical AI in RM is about leverage. You can use it to knock out emails, produce summaries and reports, and interpret PSA/PPM/RPM data for trends, risks, and variances.

It can simplify and streamline the busywork and amplify the insight.

Your Personal Productivity (Happening Now)

AI can boost productivity by quickly drafting emails, summarizing conversations, creating slides, and generating baseline reports or executive summaries — removing routine busywork so RMs can focus on higher-value decisions.

Data Synthesis (Emerging Common Behavior)

AI can help you make sense of operational data by interpreting PSA/PPM/RPM exports, identifying trends, detecting risks, explaining forecast variances, and clustering related skills — turning raw information into fast, actionable insight.

RM Operational Optimization (Next 12–24 Months)

AI will elevate RM operations by enabling predictive staffing, dynamic skills matching, automated supply–demand analysis, real-time staffing recommendations, scenario modeling, and fully automated RM reporting — driving faster, smarter, and more proactive resourcing decisions.

WARNING

Always stay within your organization's approved AI policies and guidelines.

Only use sanctioned tools, protect confidential data, and follow established governance.

While exploring AI is encouraged, experimenting outside defined parameters can create real risk for your teams, customers, and business.

Your Personal Productivity (Happening Now)

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But wait….

What if we are just getting started in resource management?

What if we have process and data issues?

Strengthen the Discipline

This is where RMOs shore up the foundational elements that make AI meaningful and trustworthy. AI can accelerate decision-making, but it amplifies whatever data and processes it's fed — good or bad. Strengthening the discipline ensures that AI has a reliable operational backbone to build on.

- Clean and consistent resource data
- Common skills taxonomy
- Repeatable intake process
- Reliable forecasting
- Strong resource governance

Strengthen the Discipline

WHILE

Exploring the Intelligence

Explore the Intelligence

In parallel — not after perfection — RMOs should actively engage with AI tools to build comfort, capability, and momentum. The biggest shift here is encouraging teams to "learn by doing," rather than waiting for the perfect readiness state.

- Start with personal productivity tools
- Experiment
- Run small team pilots
- Create RM "AI Wins" playbook
- Introduce lightweight RM challenges ("Use AI to…")

01 **If you have process and/or data issues, KEEP GOING.** Remember, Resource Management excellence is a journey, not a destination. Use RMI tools to help you.

02 **If you are *not yet* experimenting with AI, START.** Make it a priority before the end of the year. Try one use case (email, summary, analysis) to build confidence and momentum.

03 **If you are already experimenting, CONTINUE.** Create internal "AI Wins," share learnings, expand use cases, document guidelines.

RM has the ideal combination of data, process discipline, and cross-functional visibility to lead AI-enabled operational excellence.

RMI Updates

Insights Hub

- Articles

- White Papers

- Benchmark Data

- Webinars

RMI
Resource Management Institute
a part of **Belcan**

12th Annual Event

📅 February 4th

🕐 11:00 AM ET

Register Today!

STATE OF RM | 2026

Virtual Instructor-Led (Online)

- Starts February 3 (Tues/Thurs)
- Starts March 3 (Tues/Thurs)

In-Person (Classroom)

- April 20-23 (Indianapolis, IN)

On-demand version available 7 x 24

Register Today!

Register today at:

http://resourcemanagementinstitute.com/apply/

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Thank You!

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