

Fulton Bank

Tempus Resource Case Study



Challenge

Fulton Bank is a premier community bank in the Mid-Atlantic region. Fulton Bank's Internal Audit team has been using TeamMate for 25 years, an audit management software widely used and recognized among the audit industry. For many years, the scheduling function within the software met the needs of Fulton Bank's Internal Audit team. When the prior version of TeamMate was sunset, and Fulton Bank's team moved to the current version, they found the scheduling function was no longer meeting their needs for capacity planning and resource forecasting. The TeamMate+ team recommended Tempus Resource to Fulton Bank to fulfill their needs for more advanced scheduling and resource utilization needs. Heather Hirschmann, Director of Audit Professional Practices for Fulton Bank, said, "We were pleased with TeamMate+ with the exception of their scheduling function, so we looked at what Tempus Resource offered. The cost was very reasonable to add on to TeamMate+, and the integration with TeamMate+ as well as the capabilities of the platform is what led us to choosing Tempus Resource."

The Internal Audit team began its implementation of Tempus Resource in January 2024, and now is entering their second year of resource planning with Tempus Resource.

Solution

Fulton Bank's Internal Audit team has approximately 115 audits and projects that they need to schedule for each year, and they are all laid out by person and by day for the entire year. Hirschmann, who functions as the operations manager within her department, including overseeing utilization of TeamMate+ and Tempus Resource, scheduling and the team's quality assurance program within the department, uses Tempus Resource for scheduling 30 resources in her department and what audit they are working on each day, which amounts to 36,000 audit hours annually. While Hirschmann is overseeing scheduling for these 30 employees on a day-to-day basis, she and the Internal Audit leadership team take advantage of Tempus Resource's Insight+, an advanced dashboard and predictive analytics engine, to gain an unlimited ability to visualize, report and drive decisions from resource management data. The leadership team review the daily schedules of their resources, look at their project schedules, and do a reconciliation of actual hours to budgeted hours.

ProSymmetry and Wolters Kluwer, the makers of TeamMate+, have a partnership that enables TeamMate+ customers to take advantage of Tempus Resource's resource and audit scheduling, capacity and allocation data, and scenario simulations that tie seamlessly with their TeamMate+ data and existing governance, risk and compliance (GRC) systems. Tempus's flexible REST-based API enables seamless integration with other platforms so users can pull data into or push data out of Tempus Resource for further use and analysis. This integration has been pivotal for Fulton Bank's team to take advantage of both platforms. Hirschmann comments, "We thought that having this integration piece is key between TeamMate+ and another platform. I don't know if other providers would have been able to do that."





Benefit

Taking advantage of Tempus Resource has helped Fulton Bank's Internal Audit team have better oversight and visibility into all factors of its audit plan – how resources are spending their time, budgeted versus actual hours, whether audits are within budget, and if adjustments schedules need to be made to stay on track for deliverables. Hirschmann describes, "It's difficult in the beginning of the year, trying to schedule 30 people with 115 projects, so there is an ease to being able to visualize who has availability, who's overscheduled, and some of the visualization that we didn't have in our prior scheduling software. I have a lot more data insights that I can look at in Tempus Resource like resource utilization and availability with a real-time view, which is nice because timesheet data from TeamMate+ is coming into Tempus Resource. I can compare where we are with budget hours to where we should be with the project, and the integration is really helpful, allowing me to come into Tempus Resource and quickly see where I need to make adjustments to the schedule, and where I need to extend or shorten a schedule or exchange a person. From a decision-making position, the integration of real-time data from TeamMate+ to Tempus Resource enables me to make changes as needed on a real time basis, and allows my team to see it as well."

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Tempus Resource helps Fulton Bank's Internal Audit team achieve their aggressive audit plan. Hirschmann explains, "Our audit plan is approximately 36,000 hours and our resource availability is 36,000 hours, so there is not a lot of open time. As audits go over time – which naturally they will do – there has to be that flexibility for me to be able to push things or add a day here, take a day here, or put someone totally new on the audit. Tempus Resource helps me look at department and individual utilization, which is the number of hours scheduled for each auditor as a whole, by project, and by phase. Being able to view and manage utilization to ensure I am not overloading someone differently than another person is key. Being able to customize the hours that are assigned by level or person ensures the schedule can be completed. A manager might only have 6.5 hours a day that I schedule them on projects, and a senior might have 7.5, then I might have a part-time person that only really works 5 1/2 hours on audits a day. Being able to customize those hours that I schedule and have a standard template for each person, it's just very helpful."





With Tempus Resource, Fulton Bank's Internal Audit team can understand what's happening within budget in real time, including how many hours are being worked compared to what was scheduled. For Hirschmann, that is very important to understand. "For example, I have this employee scheduled for 20 hours, but you've only put 10 in so far. What happened to the other 10 that you were supposed to work on the project? Being able to understand gaps in the project time, as well as actual utilization is something else we track."

Since integrating Tempus Resource with TeamMate+, Hirschmann says they have gained a lot of insight into when scheduled work on audits is not meeting goals. "We've been able to see just how often what is on the schedule is not happening. You might be scheduled for 6 1/2 hours this day, but you really didn't put 6 1/2 hours to that project that day, and we can get down to that level, whereas before it was much more difficult to analyze and get that data in our other scheduling system. Now with this reconciliation we've built within Tempus Resource, it's to that level of detail at the individual level, so I know that last week you should have worked 20 hours on my audit. On Monday morning, you only put 15. What happened to the other 5? We know things don't always happen according to the schedule, but we need to know how that impacts things moving forward and what do we need to adjust. I think that's very helpful. And it's easy to get that data because we built the reporting that we need for that analysis."

Results

When Fulton Bank was beginning its implementation of Tempus Resource, ProSymmetry's Customer Experience team helped make sure that Hirschmann's Internal Audit team was getting what they needed out of the platform and helped set up customized views for users so that their dashboards were relevant and contained the most important data for quick and easy analysis. Hirschmann says, "We use Insight+ as our dashboard view into our real time data. The ProSymmetry Implementation team was instrumental in building out the vision of what we needed to see and what we were used to seeing, plus they provided enhancements to things that we were doing manually. Every Monday, 7-8 of the senior auditors would be reconciling the audit's actual time to their scheduled time by person, and then as a whole by project. They would be doing that work manually by looking at various different reports and pulling all of that together in a template. Now that ProSymmetry has helped us build reports where it's done automatically. Monday morning when our time is integrated into Tempus Resource from TeamMate+, all that comparison is done. ProSymmetry helped execute that vision of what we wanted to see. And so now, instead of spending an hour or two for seven people every Monday to reconcile time, it's done and they can just take a look at it and let me know what adjustments need to be made based on that. That was very helpful."

Hirschmann's Internal Audit leadership team is able to get the analysis they need on the Insight+ dashboard. "The team has everything they need to see in Insight+ on one page, such as, what's the project look like? What's their daily schedule look like? What's the reconciliation of time? What's their yearly schedule look like? They have everything they need at their fingertips within Tempus Resource and they're able to look at other team members, adjust the view to know who is on the team, who has





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When it is time for Fulton Bank to create their annual audit plan for the coming year, having data available about resource utilization from Tempus Resource has helped Hirschmann and her team plan more efficiently. "We do upfront capacity planning when we're creating the audit plan for the next year. That's where we are evaluating the expected audit hours per individual based on our historical data for the year. If it would come out that our plan is 40,000 hours and our resources are 36,000, then something has to give. We either have to take something off the audit plan or we have to fill the gap with co-sourcing or additional resources. Our audit plan and the completion of that is always a very important deliverable that must be done, so having real time monitoring of the completion of the plan and available resources is key."

While Hirschmann's annual audit plan goes through a sophisticated creation and approval process to ensure it is achievable and that the team can stay on track, occasionally special projects need to be added to the plan. Hirschmann describes, "There are times when we have to take something from March and move it to September. There are some big changes that are made or new projects added during the year. I have to be able to easily see where I can fit it in. It's nice in Tempus Resource to see availability and be able to replace auditors or shift a whole audit. There is a lot more ease in modifying our plan with Tempus Resource as a tool than what we had with our other system."

The Internal Audit team has also been able to save valuable time and gain efficiency with Tempus Resource, as the analysis that is built into Insight+ saves time for Internal Audit senior leadership and their staff, who no longer have to gather data from multiple sources to create weekly utilization reports. Hirschmann says, "The automated reconciling of time has really helped. Our admin was doing some reporting as well, and Tempus Resource has automated some of that for her too. These have been some of the biggest wins from an efficiency standpoint."





Hirschmann and her Internal Audit team have had a smooth transition integrating with Tempus Resource and timing their implementation to what would work with their annual planning. “From the very beginning of our conversations with the ProSymmetry team, with pricing, with negotiating – all that went very smoothly, getting on the queue for implementation was very timely, and we were aggressive. I wanted to jump in at the start of the year, and have my team start scheduling by the end of the month. I would have questions, and the ProSymmetry team would be willing to set up a meeting that date or the next or have a weekly touch point. Phase one was formatting our schedule and understanding how to use the application, how to set up all the attributes and customization. Our next phase was getting the TeamMate+ integration set up. And our third phase was Insight+ and getting that up and running. All the phases went very smoothly. When I had an issue, I was raising the flag and people were there right away for me answering my questions, providing solutions, getting the people who needed to be on the call so we could get the solution. That was always helpful. Everyone was friendly and patient with me as I was trying to rethink our current scheduling process and how to take advantage of the enhancements and capabilities within Tempus. I think that was probably the best experience that I've had with partnering with a new system and going through an implementation. It's been very helpful and very easy to make the transition, and I've been very appreciative of the whole team.”

As Hirschmann speaks with other audit leaders in her industry, she continues to recommend Tempus Resource. “I continue to spread the word. Someone in my peer group threw out the question, ‘Has anyone used Tempus?’ I said, ‘I had a great experience with them.’ The pricing was right. More and more of us in the audit industry are moving to TeamMate+ and their current scheduling feature doesn't meet our needs. More of us are thinking, we need to find something different and this is prompting more interest in Tempus Resource.”

Headquartered in Lancaster, Pennsylvania, Fulton Bank is a premier community bank in the Mid-Atlantic region. As a subsidiary of Fulton Financial Corporation, a more than \$30 billion financial services holding company, Fulton Bank offers a broad array of products and services at more than 200 financial centers across Pennsylvania, New Jersey, Maryland, Delaware, and Virginia. Fulton Bank focuses on building strong customer relationships, providing significant community support and empowering more than 3,400 employees to do the same.

Tempus Resource by ProSymmetry is a purpose-built, resource portfolio management solution providing many Fortune 500 companies with resource forecasting and capacity planning solutions to help make strategic decisions for their businesses. With capabilities including bulk resource forecasting, skills and talent management, portfolio and resource capacity reporting and interactive scenario planning and What-If analysis, Tempus Resource gives organizations actionable intelligence, cutting-edge analytics, and real-time scenario analysis.

