RSM Improves Client Satisfaction and Global Business Processes with Mavenlink

**Global Support for Tax Needs**

RSM US LLP is an audit, tax, and consulting firm focused on the middle market in the United States and Canada and is a member of the global accounting network RSM International, with the firm now the fifth largest accounting firm in the United States.

RSM provides a wide variety of services including global, public, and private audit services, support for a wide variety of tax needs, as well as full service consulting and outsourcing services.

For more than 90 years, RSM has been delivering professional services aligned with their values of respect, integrity, excellence, teamwork, and stewardship. Middle market companies have come to see RSM as trusted advisors who understand how to navigate the complexities of doing business both domestically and globally. RSM continues to invest heavily in the enhancement and development of new and existing services.

"High impact key performance indicators really allow our client CFOs to understand how their service providers and local teams are performing. The collaboration and communication aspects of Mavenlink, which help localize work, has helped us ensure nothing is missed."

Jon Caforio, Principal, Strategy and Management Consulting, RSM
THE CHALLENGE

The Need to Go Deeper

As a highly successful and consistently expanding organization, RSM needed support for their time- and work-intensive projects. The Global Compliance and Reporting Services team at RSM had relied on a homegrown system called Global Tracker, which grew out of the company’s audit and tax practices. However, this solution was only providing the minimum support that the work required, with 2000 users in the system including clients and employees, and had reached its limits.

While the legacy Global Tracker had helped RSM find success in their day-to-day work, there were many desired features missing as the team continued to innovate the approach to global compliance, including:

More Control Over Resources

Resource scheduling and project billing were not readily available with RSM’s legacy system, creating less control over resources needed across the many projects and the need for significant manual work to be completed for complex billing situations.

Critical Insights into Project Trends

The prior system did not provide Key Performance Indicators (KPIs) regarding project performance. These lacking indicators included the ability to granularly see where projects were in the process causing the program managers to have difficulty regarding visibility into project needs.

“Using a new project management solution meant we only had to configure instead of building and expanding from the ground up,” said Jon Caforio, Principal, Strategy and Management Consulting at RSM.

"Mavenlink’s activity feed and the individualized project management views for people to log in and immediately see their projects, instead of having to sift through all projects, was a major difference given our global scale."

Jon Caforio, Principal, Strategy and Management Consulting, RSM
Global Connectivity and Insights

RSM’s desire to enhance their project management approach, coupled with the limitations of their homegrown solution led the organization to look for a new project management solution that could overcome their major hurdles.

During their search, RSM evaluated PPM, PSA, and Project Management solutions. The RSM team considered Microsoft Dynamics 365, SmartSheets, PlanView, and Netsuite Open Air SRP, among others. They decided on Mavenlink due to its common sense approach to project management. Another reason was because of Mavenlink’s future as a company, which aligned with the continued path of growth and success found at RSM.

RSM had several critical needs that had to be fulfilled by Mavenlink, which included:

Client Support
RSM needed to enable their business to better support clients through their Global Tracker system, which provides global statutory audit and tax compliance work. Mavenlink’s Insights and easy to use configuration made that improved resource visibility and control possible.

Project Insights
Mavenlink’s project status reports and ability to provide automated critical information to each team member helped create a greater interconnectivity and a much easier pathway to finding crucial data for each resource’s role within a project.

Global Project Data
Being a business that provides services around the world, RSM needed Mavenlink’s project portfolio level views through dashboards and reports, which can distinguish between each company and country views, down to local taxing bodies as needed.

“...The practical usability perspective of Mavenlink was critical. How Mavenlink delivers its services from a program and project management perspective and how it moves a client forward in the solution resonated with us.”

Jon Caforio, Principal, Strategy and Management Consulting, RSM
With Mavenlink, we can solve our project challenges on a global basis by having all types of users in the system and allowing them to see only what they have access to. And the automated reporting increases client’s visibility and satisfaction.”

Jon Caforio, Principal, Strategy and Management Consulting, RSM