iManage
Making knowledge work

RSM AUSTRALIA SAVES NEARLY $1.5M IMPLEMENTING iMANAGE WORK 10

Accountancy standardizes and optimizes processes, scaling to increase productivity and revenue

RSM

Industry:
- Accountancy

Headquarters:
- Perth, West Australia

iManage footprint:
- iManage Work 10

OIA

OIA is the longest-standing iManage reseller in the Asia-Pacific region, with over 25 years' experience. Working with businesses across a range of industries and professions for more than 30 years, OIA understands what is required to deliver the new style of IT needed to keep you ahead of the game. Partnering with some of the world's leading providers of technology, OIA brings it all together in end-to-end solutions that allow you to focus on running the business, not managing the IT.

RSM Australia is an accounting firm with 32 offices and 1,750+ employees. Using and maintaining multiple disparate systems across their footprint created an ongoing challenge to efficiency and collaboration. The leadership envisioned all staff in all locations using the same tools and working on a single platform that would enable all content to live in one system. The firm had used older versions of iManage clients for more than a decade, and — as part of the project to consolidate the firm's data, optimize their processes, and enable the business to scale as they increased productivity and revenue — the firm decided to upgrade to iManage Work 10. The team plans to migrate the firm's data to the iManage Cloud in the near future as well, and are excitedly anticipating the additional features and benefits that will bring to their users.

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>
> **Mike Peters**
> ECM & Information Management Manager, RSM Australia

A founding member of the RSM global network, the world's 6th largest network of audit, tax, and consulting firms, RSM Australia is committed to sharing skills, insight and resources, as well as a client-centric approach based on a deep understanding of their client's business. RSM empowers clients to move forward with confidence. This is The Power of Being Understood.

The challenge

Thirty-two offices, thirty-two ways of working

Many of RSM Australia's regional offices are geographically remote, and until the firm was able to resolve the internet access challenges those offices faced, the workers' overall capabilities and collaboration opportunities were limited. This relative isolation gave rise to another issue, as well, in that most offices were long accustomed to finding their own ways of doing things.

"When you have 32 offices all operating in different ways, everyone's grasp of the situation is limited," said Mike Peters, ECM & Information Management Manager at RSM Australia. "So first we needed to demonstrate the problem, identify the challenges we were facing nationally, and define the scope of it. But once we all understood the problem, it was 'What can we do to resolve this?', and they were all in."

Senior leadership at RSM advocated an approach that would have all geographical locations working on the same platform. To that end, part of RSM's 2024 business strategy prioritized building and embedding digital capabilities, driving efficiency, growth, and competitiveness.

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The solution

The path to delivering the modern experience

RSM began rolling out iManage Work 10 to address the challenges, gradually moving toward having everyone using Work 10. All the data had to be consolidated to streamline internal processes across Australia. Everyone needed to be on the same system so that processes could be optimized going forward. iManage provided that structure.

"At that point in time we had 18 different practice management systems," recalls Peters, "and the ability of iManage to integrate with those systems made the implementation that much smoother. iManage Work 10 has the flexibility to allow for multiple configurations, enabling people to work in a variety of ways on the same system. That's been a major benefit in our situation."

RSM also worked with one of the best certified iManage implementation partners in this region, OIA. The Work 10 project and the move to the iManage Cloud would not have been possible without this key partner relationship, their hard work, and support.

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A timely move spells great ROI

The initiative to ensure the stability, reliability, and high availability of their network to the more remote offices and the move to iManage Work 10 were both completed about six months prior to the quarantines of COVID-19, timing that paid off well for RSM. Their teams transitioned easily from working in the office to working from home — a real advantage for RSM and its clients. Throughout the pandemic, the business continued its operations without a hitch, with its people doing what they needed to do from wherever they were.

"Our partnership group said that if we hadn't moved to iManage Work 10 when we did, the transition to working from home would have been hugely challenging," says Peters. "That made the return on investment quite good for us."

Executive support paves the way forward

In a full-scale implementation, success hinges on support from the C-suite. The big sell for the RSM Executive was showing that the efforts to move to iManage Work 10 would contribute directly to increased productivity and, consequently, revenue growth.

"RSM leadership gave the project their full support," shared Peters, "ensuring the fantastic best practice that we have in the organization today. iManage is now the bread and butter of the way that we do our work."

Peters said that 80 percent of the staff learned to use Work 10 very quickly. Since most users found the UI intuitive and were able to get going easily after minimal training, his team focused on the users who needed more support and reinforcement. They held intense, mandatory training sessions for this group, answered their questions, and guided them through the entire onboarding process.

The iManage system underpins the foundational ecosystem over which RSM can overlay other technology improvements, such as robotics. And standardizing processes with iManage Work 10 has delivered on client service and back-office operations efficiencies, freeing up staff to do more value-add services for clients.

The benefits

Full commitment to iManage has allowed RSM to truly scale

The speed and stability of the work environment are dramatically improved on the iManage platform, and the performance, especially within Outlook, was a big selling point for RSM users.

"By adopting iManage Work 10 before lockdowns during the pandemic, RSM maintained business as usual — averting the loss in clients, employees, or revenue that the pandemic might have caused," says Peters. "And a full commitment to iManage and the firm's overarching goal of standardizing on one platform has allowed RSM to truly scale, regardless of its teams' geographies."

Satisfied clients and major savings

Clients have been exceedingly pleased by the firm's upgrade to iManage Work 10, as well. The CFO of an energy company now exchanges audit documents with RSM securely through iManage Share and is "in raptures" over the ease of collaboration. Another client was delighted to sign his documents without even getting off his tractor.

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Mike Peters
ECM & Information Management Manager, RSM Australia

"The move to iManage Work 10 has paid off for us more than three times over," said Peters. "Higher productivity makes us more competitive and increases our revenue growth — and we've seen that," he adds.

"In the first seven months of the current fiscal year (2022/2023), RSM identified savings of $1.41 million from the initiative to automate background processes and mundane tasks, including iManage Work 10 and our robotics overlay," says Paul Joseph, CIO at RSM. You can add that to the $500K savings when we were first implementing the changes — and we are just getting started. We haven't moved to cloud, yet."

Let's see if iManage still stacks up

Moving to the iManage Cloud was a no-brainer, but the business case had to go to RSM executives and every partner in the firm to be approved, so the team did their research to validate that they were making the right choice.

"From a strategic perspective," Peters said, "it would cost us a lot of money to change. But we thought, let's not make money the object. Let's have a look and see if it still stacks up."

So RSM paid for an analysis of the vendor options before committing to moving to the cloud with iManage.

"At the end of the day, the decision boiled down to us being exactly where we needed to be and staying with iManage," says Peters. "It's still the right choice for us. Joseph's strategy to keep the firm competitive is to stay ahead of technology: to be leaders and take the calculated business risk rather than being risk-averse and being left behind. That's the approach that has gotten us to where we are now, and we're sticking to it."

Looking ahead

As they prepare to migrate 24 million documents to iManage Cloud, the team anticipates still greater benefits ahead. Peters told us that many of the partners are already asking for new features that will be available to them after the move. Joseph looks forward to integrating with the Microsoft stack via iManage Cloud — Teams, Outlook, Word, etc. — and the team is also excited to integrate with Microsoft Power Automate via the iManage connector. iManage Tracker will enable them to further automate the approval process for certain types of content, and they are hoping to make iManage Security Policy Manager part of the implementation, as well, because it makes securing documents so easy.

About iManage™

Dedicated to Making Knowledge Work™, iManage provides an intelligent, cloud-native, secure knowledge work platform that enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced AI and powerful document and email management create connections across data, systems, and people while leveraging the context of content to fuel deep insights, business decisions, and collaboration. Underpinned by best-of-breed security workflows and governance, iManage has become the industry standard — continually innovating to solve complex professional challenges and enabling better business outcomes for more than a million professionals across 80+ countries.

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