![iManage — Making knowledge work]

RSM Australia lays foundation for massive growth with move to iManage Cloud

Accountancy delivers on next-level content management, data transformation, and an ever-better client experience

![RSM logo]

Industry:

- Accounting

Headquarters:

- Perth, Western Australia

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Share
- iManage Drive
- iManage Mobility
- iManage Threat Manager
- iManage Tracker

![OIA logo]

OIA has more than 30 years' experience helping businesses modernize their work management platforms. It provides end-to-end solutions so customers can focus on running their businesses.

The leadership of accounting firm RSM Australia long envisioned all staff in all locations working with all content on one system, a single platform, in the iManage Cloud. Nine years ago, the RSM team implemented a system of 32 different practice management databases, one from each of its offices, talking to one iteration of iManage Work 10. Since then, they've moved all 32 offices to a single practice management system. This has allowed the firm to prepare for and greatly simplify the move from iManage on premises to the iManage Cloud.

A founding member of the RSM global network, the world's 6th largest network of audit, tax, and consulting firms, 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.

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>
> **Paul Joseph,** CDO, RSM Australia

The challenge

Fulfilling future-forward ambitions

RSM is taking its content management into the future. This means merging digital strategy and digital literacy goals with aggressive growth projections and ensuring a next-level journey for employees and clients.

The firm's 2030 strategy includes growth, data transformation, increasing digital literacy, updating information management policies, and reinforcing the concept of a single source of truth. To this end, they have restricted the use of thumb drives and taken down network servers. The next challenge is limiting the use of OneDrive. Artificial intelligence also plays a part in their future-forward ambitions.

Having determined that moving to the iManage Cloud was the next step for the firm in accomplishing its 2030 goals, RSM set out to identify the best way to minimize the impact on the firm and its users as it moved 25.3 million documents, 11 million emails, and 31 TB of data into the iManage Cloud. That move, years in the making, began with iManage and enlisted the services of iManage partner, OIA.

The solution

Only the tip of the iceberg

"The migration to iManage Cloud was so smooth I did not receive one single text message from any of our partners, I didn't get any escalations to the executive board, or to our Chief Executive Partner, and it was so seamless that you wouldn't even know that we had moved to the cloud," said Paul Joseph, Chief Digital Officer, RSM Australia

What people did notice was the accelerated speed of the iManage system. While the system was the same for people in all the right ways, there was a huge increase in performance that was obvious to everyone as they did their work.

In terms of new initiatives that the move to iManage Cloud makes possible, Mike Peters, Information Manager at RSM Australia, talks about the time-consuming distraction of context switching, which he says is a huge productivity killer. The firm's goal has been to greatly reduce, if not eliminate, this distraction and its negative effects. To achieve that goal, Peters is taking steps to gain access to some of the newest capabilities in iManage for RSM users.

The integration of iManage Work 10 and Microsoft Teams, for example, enables much more effective collaboration. People can work with, save, and share content changes and even Teams chats in their proper context. Peters says the ability to edit content in the Teams environment is a vast improvement for RSM users.

"But that's only the tip of the iceberg," shares Peters.

Next-generation co-authoring in iManage enables people to work simultaneously on a document in their native Microsoft environment while maintaining RSM's single source of truth in iManage. Whether they eliminate the check-in/check-out process or simply make co-authoring the default of their configuration, Peters anticipates that the resulting productivity boost and convenience will remove any residual resistance to moving content from OneDrive by making iManage both easier and more collaborative.

"iManage co-authoring is a game-changer," says Peters. " It changes how we work internally, motivates adoption, and greatly improves how we work and collaborate with our content. The productivity gain is immeasurable."

The business outcomes

RSM projects more than $2M savings in the first four years of iManage Cloud

There are 2,000 people in the firm, working in 32 offices, and every part of the firm is using iManage: HR files, client data, everything. Peters says iManage Share is sitting at 9.1 TB of data.

"We made it, we're here," Peters says, his pride evident. "RSM moved 25.3 million documents to the iManage Cloud, along with 11 million emails. That's 31 TB of data, which is increasing by half a terabyte every four weeks. And everything is so much faster, now."

According to Peters the internet gateway resulted in a substantial improvement in performance. "The migration was so simple, so seamless, no messages, no escalations. People didn't even know the firm had made a change except that the system was so much faster. The speed of the preview engine blew them away," he recalls.

Peters' original business case projected a $1,540,183 (AUD) reduction in the firm's Total Cost of Ownership, based on 1,800 users and calculated over the first three and a half years (41 months) of the iManage Cloud implementation. He calculated additional savings of $735,105 over that time, for a grand total of $2,275,288. Beyond the many other business advantages, these savings were one of the key business drivers for moving to iManage Cloud. And while it is too soon to report the final ROI, the firm is currently on target to achieve this goal.

Peters says moving to iManage Cloud with iManage and OIA has helped RSM build the proverbial base of the pyramid that takes the firm into the future, and that he believes it is "the best move they could have done."

"OIA is one of the best certified iManage implementation partners in this region," confides Peters. "They were a key collaborator in the move to Work 10 and iManage Cloud, where their hard work and support were invaluable."

"It's such an exciting journey," Peters says. "There are so many doors this move to iManage Cloud opens, that it's hard to choose what to work on day-to-day."

It's a one-stop-shop with iManage

People at RSM, including some partners, are starting to use iManage Mobility, and the feedback is very good. They appreciate the flexibility it gives them and the broad access to emails and other information. The mobile devices are all registered with the firm, so it's very secure.

To promote this capability, IT is producing high-level RSM-centric training materials that imitate the look and feel of the more detailed iManage documentation. The team looks forward to offering users even greater accessibility and convenience in their work communications when they combine the Teams app with the Mobility app.

Peters says the release of the iManage integration with Teams to the broader organization, as well as iManage Mobility, is imminent. iManage Drive has recently been implemented as part of the strategy to limit access to RSM content outside of the iManage environment.

The firm also decided to implement iManage Tracker for task and workflow management and iManage Threat Manager to prevent data loss and deliver usage analytics. The team is continually aligning the platform's capabilities with RSM's business strategy and desired outcomes.

"We can do everything we need to do with iManage," says Peters. "It's a one-stop-shop. And the next part of our journey is already starting to percolate through."

Looking ahead

RSM is constantly reviewing their tech stack and looking for opportunities to integrate further with iManage. This will open still more doors for progress toward their 2030 strategies — and opportunities for additional savings.

Peters describes iManage and Microsoft as being in lockstep in terms of ensuring the compatibility of every new application so that their integrations are seamless for users. This gives him with confidence that RSM is on the right path in its relationship with each of them.

"The iManage partnership with Microsoft is so strong that as soon as we start thinking about something, we learn that it's already on the iManage roadmap, and we want it before it is even released," Peters says — laughing, but in earnest.

The firm participates in multiple early access programs and looks forward to every new release of iManage functionality and integration with Microsoft products.

"We're very excited to have five of our divisions giving next-gen co-authoring a try," says Peters. "It's a monumental step forward already, and we haven't even taken it externally with clients yet; that's on the horizon."

RSM is also learning more about the integration of iManage with Microsoft Copilot. He says this aligns well with RSM's overall digital transformation strategy for introducing AI into existing RSM processes.

Peters advises any firm currently on premises with iManage, "Don't hesitate to move to the cloud with iManage, you won't regret it. I was a bit apprehensive, but in retrospect our move was done at the right time and was so seamless. Don't hold back."

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iManage
Making knowledge work

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