

Case Study

RSM Australia

Upgrading iManage to be Productive in a Pandemic



Company

RSM Australia is a world-leading provider of audit, tax and consulting services to entrepreneurial growth-focused organisations globally. In addition to local knowledge provided by their advisers in 30 offices across Australia, they draw on their international reach and scale to ensure clients stay at the forefront of the world's best practices, technology and innovation within a rapidly changing global economy.

Overview

The RSM Australia team have been working with OIA and iManage for 7 years to ensure that RSM's clients can be provided with the most timely and accurate service possible.

In 2017 RSM decided to upgrade to iManage Work 10, as the ability to work anywhere, on any device, any time would drive productivity and service improvements. Mike Peters, the Enterprise Content Management Manager, also implemented a project to standardise the firm's processes to enable all offices to provide consistent service to clients, no matter their location around Australia.

When the COVID pandemic hit, suddenly the whole firm needed to work remotely while still providing those high levels of service.



Outcome

RSM and OIA implemented Work 10 in phases, first with regional pilot sites, and then full implementation to all staff over the next 18 months. As a result of the upgrade, RSM saw increases in productivity, staff retention, and revenue for the firm.

When the global pandemic hit in March 2020 the new system was put to the test, as overnight staff needed to perform their same role from anywhere but the office. With iManage Work 10 in place staff didn't miss a beat, were able to access all client information, and continued to perform their work at the same level as when they were in the office.

RSM's team could collaborate, retrieve crucial client data, and share information with clients, all in the same manner that had been possible while working in the office. Staff had access via laptops, mobile devices, and tablets to be productive while adhering to the firm's strict security policies.

Crucially for RSM's clients, the firm is now able to meet their needs faster, while the new version of iManage contains enhancements that enable RSM to meet its ISO 27001 compliance for retention and disposal of client information.

With the foundation now in place, RSM can consider further enhancing the service it provides its clients by taking advantage of other iManage toolsets for automation, artificial intelligence, and much more.

"Thanks to iManage, during the pandemic RSM has been able to provide clients with timely, expert advice to assist those clients as they navigate the upheaval of COVID-19." Quote by Paul Joseph, CIO

Product Overview

iManage was founded in 1995 and is a market share leader rapidly gaining momentum and expanding into new markets. Headquarters are based in Chicago USA however their products are relied on by more than 1 million professionals worldwide.

With iManage Work 10, law firms do not need to change how they work. Instead, as attorneys travel to meet with clients, colleagues and outside contractors, they can securely access documents from wherever their work takes them in a user-friendly fashion that supports productivity and ensures compliance.

Email and document management for lawyers and other professional service firms is a must. The proper and secure handling, filing and protection of sensitive documents, contracts, communications, and client information is a standard that all law firms and professional service organisations are expected to adhere. At the same time, firms want to increase their efficiency without adding undue labour costs or manual tasks. That's why iManage Work 10 is such a seamless match for how today's legal professionals work and access information.

About OIA

Today's business conditions are placing greater demands on your Information Technology. Organisations are dealing with explosions in the volume of email, documents and data in general. Clients are seeking out a more efficient and economical service meaning your users need faster, more flexible systems in order to provide the levels of service required to remain competitive.

OIA has been working with businesses large and small for more than 25 years and understand 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.

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