

CASE STUDY

**Leading International Audit,
Tax and Consulting Firm, RSM,
Benefits from Real-Time
Business Insight in its Legal and
Risk Advisory Practice Areas**



Industry:

Accounting

Headquarters:

Chicago, Illinois, United States

RSM is one of the largest audit, tax and consulting firms in the world. With offices in South Africa, and across the globe, the firm delivers a range of multi-disciplinary services, including audit and assurance, consulting, outsourcing, digital, risk advisory, tax, transaction advisory and tax.

Key stats at a glance:

- **1,400 open matters** now managed seamlessly across Legal and Risk Advisory
- **30+ professionals** using Co-Flo daily across RSM South Africa
- **100% visibility** of matters via real-time business intelligence dashboards
- **Automated creation** of matter workspaces and MS Teams sites

Why it matters?

By interconnecting iManage Work with RSM's GreatSoft practice management system, Co-Flo eliminated the silos that once slowed down client service delivery. Professionals can now create, manage, and close matters without leaving iManage — saving time and improving accuracy.

Overview

RSM has deployed Co-Flo for matter management in the Legal and Risk Advisory practice areas in South Africa, with over 30 professionals currently using the solution. Co-Flo has interconnected RSM's document and email management system and practice management system, giving the firm end-to-end visibility of the nearly 1400 open matters in these practice areas.

The Business Need

As part of the firm's digital transformation strategy, RSM implemented iManage Work, a matter centric document and email management system as a central repository for the firm's matter-related information. At the same time, the firm already had in place GreatSoft, the firm's practice management system for activities such as client management, billing and processing, and time and disbursement management.

With both iManage Work and GreatSoft key systems for client service delivery, RSM needed to connect the two solutions to create a seamless and unified work environment – with end-to-end oversight capability – for professionals across its Legal and Risk Advisory practice areas.

Matteo Pagani, CEO of Co-Flo, states, "This is a common issue that professional services firms face. The nature of their work is such that they need to deploy multiple applications to enable a smooth, efficient and profitable business operation. But if the technologies aren't able to talk to each other, they create and even exacerbate the existing inefficiencies – the very thing that firms are looking to address when they deploy those solutions. Co-Flo helps to overcome such issues by providing an optimised work environment, in line with industry best practice for commercial operation."

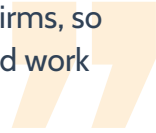
The Solution

Implementing Co-Flo – a solution that interconnects business processes, automates workflows and offers all the essential matter management capabilities – was the obvious choice to bridge the gap between iManage Work and RSM's practice management system to create a truly unified experience.



Co-Flo is expressly developed for the iManage environment, so it was a logical choice of a 'bridging' solution for us. Additionally, Co-Flo easily integrates with other systems that are routinely used by professional services firms, so we were confident that it would work with GreatSoft.

Thilen Pillay, Director, Risk Advisory Services at RSM



The Benefits

Professionals create all new matters using the Co-Flo interface without having to leave iManage, saving them a great deal of time. When a new matter is created using Co-Flo, the system automatically creates a matter workspace in iManage Work, with the correct folder structure for that matter type. To ensure confidentiality of information, the matter owner is able to authorize and enable user access to the workspace based on team members' needs, straight from the Co-Flo add-in within iManage.

Day-to-day collaboration and project management of matters have greatly improved. On opening new matters in Co-Flo, the matter management system automatically builds a Microsoft Team with pre-defined skeleton work plans while also creating a dedicated OneNote location. Matter owners are able to create task lists and set reminders for every task so that critical deadlines are not accidentally missed. Matter owners also have access to a calendarized summary of upcoming tasks in Co-Flo, which they are able to view at a glance.

All this is supporting the firm's Legal and Risk Advisory practice groups to deliver a timely and enhanced service to clients.

Once matters are closed, safeguards are in place to ensure that the integrity of matter-related information isn't compromised. For instance, when matters are archived in iManage Work, Co-Flo automatically converts the documents to 'read only' so that no changes can be made to the data.

Most importantly, the practice groups now have complete visibility of the status of all the matters at the click of a mouse, using Co-Flo's advanced business intelligence dashboards. The RSM practice leads have access to real-time data via these dashboards on matters by legal advisor, matter owners, service categories and even sub-service categories. Similarly, they can view data on matters by country, priorities, billing and so on. With Co-Flo integrated with the firm's practice management system, practice leads have complete confidence that they are always viewing the latest information.

In the immediate future, RSM is looking to expand the Co-Flo solution into other practice areas, especially with Tax Consulting.



Administration of matters is so much simpler for matter owners, and the reporting capability is invaluable for practice leads. At any point in time, we have our finger on the pulse of the business in these practice areas.



Thilen Pillay, Director, Risk Advisory Services at RSM

CO-FLO 
Enterprise

www.co-flo.com

For more information contact:
info@co-flo.com