

"When I think of RSM, I think of having a true partner. They are an extension of me, and we partner together to solve Bridgeway's technology needs. It is really unique and unlike most vendor-client relationships."

– Ian Sale, Head of Technology, Bridgeway Capital Management

## CASE STUDY: RSM SERVICES HELP INVESTMENT FIRM ACCELERATE TECHNOLOGY DELIVERY

### Overview

Bridgeway Capital Management (Bridgeway) offers expertly designed investment strategies, subadvisory services and mutual funds to institutions and advisers. Founded in 1993, Bridgeway is based in Houston and has approximately \$8 billion in assets under management. The firm is committed to enabling transformative change in the community and around the world and donates 50% of its profits to nonprofit organizations.

### Background

Poised for growth in an increasingly complex and competitive market, Bridgeway sought to identify a new technology managed services provider (MSP) that would understand its regulatory environment and have the depth and breadth of capabilities to manage current and future technology needs. The new MSP solution needed to advance Bridgeway's goals in four key areas:

- **Information security:** As stewards of others' assets, Bridgeway prioritizes security in order to protect client information and intellectual property. Bridgeway's technology MSP needed to have the skills, experience, tools and procedures to meet Bridgeway's security goals in a rapidly evolving cybersecurity landscape.
- **Superior technology support:** Bridgeway strives to develop leading technology capabilities while also allocating maximum resources to providing value-added services to clients. In order to accomplish both, the firm wanted to outsource technology to a capable, experienced MSP.
- **Business and cultural alignment:** Bridgeway's vision is to create an extraordinary future for its clients, the community and the world. The ideal technology partner needed to align with Bridgeway's vision, mission and culture.

- **Technology as a strategic resource:** Bridgeway considers technology critical to building a scalable, efficient and enduring business. This requires a technology partner with the vision and leadership necessary to serve as a strategic advisor capable of providing tactical advantages through the innovative use of technology.

## Solution

Bridgeway undertook a thorough service provider due diligence and selection process, at the end of which it became evident that RSM's capabilities aligned with Bridgeway's needs, and the cultures of the two companies aligned closely.

"We selected RSM because we continue to believe in technology outsourcing, but needed a partner that could grow with us," said Ian Sale, Bridgeway's head of technology. "We are expanding in size and capabilities, and need an MSP that can support that growth."

Bridgeway engaged RSM to provide a complete, fully managed technology solution, allowing the firm to focus valuable resources on stewarding client assets and enabling transformative world change. RSM's breadth and depth of technology, security and governance capabilities uniquely positions the firm to help Bridgeway efficiently scale its business for the future.

"Depth and breadth of capabilities were a big part of why we selected RSM," commented Sale. "Their geographic breadth was also important as we consider growth options beyond our Houston headquarters."

With Bridgeway's commitment to outsourcing and a technology plan designed to scale with growth, the company takes full advantage of the flexibility offered by infrastructure-as-a-service (IaaS). RSM helped to optimize the company's IaaS environment, increasing the maturity of its cloud infrastructure management and security approach.

"RSM's expertise in the cloud and ability to manage our IaaS environment really is unparalleled," said Sale. "We have already benefitted from a significant maturation in cloud management, oversight and reporting, in addition to a new perimeter firewall strategy that has streamlined policy enforcement and auditing across our sites."

The RSM team has worked with Bridgeway to co-develop an intuitive dashboard, key performance indicators and metrics to detail how managed services are delivered. This reporting provides more extensive, efficient insight to demonstrate the progress of initiatives and ensure that expectations are being met.

"RSM provides us with very sophisticated solutions, and for us to manage all of that, we needed consolidated reporting to assess in the status of the relationship," commented Sale. "RSM developed a sophisticated reporting platform so we can see that we are getting what is promised and identify opportunities to further enhance technology delivery. That work has been transformative for us."

Beyond managed technology services, RSM has become a true business partner for Bridgeway, providing the technology the company needs to advance the business, as well as other key services. This depth of combined technology and advisory knowledge is atypical for an MSP.

For example, RSM's security, privacy and risk practice has teamed up with Bridgeway and a leading managed security services provider to deliver a comprehensive set of security services, including firewalls, endpoint protection, 24/7 security monitoring, vulnerability testing and remediation, and log aggregation and correlation.

"We take the responsibility of stewarding our clients' assets very seriously," said Sale. "Core to that is security. To keep our client's information and our intellectual property secure, we need a resilient infrastructure and a comprehensive security strategy. The fact that RSM is such a security-forward organization is very important to us."

RSM is also delivering an innovative, all-inclusive pricing model aligned to Bridgeway's specific business objectives.

"RSM has demonstrated extraordinary creativity in packaging a comprehensive set of technology services via local and national resources and a commercial model aligned to Bridgeway's business drivers," said Sale. "In RSM, Bridgeway has found a partner with the capabilities and principles to help us achieve our technological goals today and in the years ahead."

Most importantly, the two firms discovered a cultural fit and symmetry, with each having a key core value centered on stewardship. Bridgeway donates half of the company's profits to nonprofit organizations that support numerous causes both domestic and international, with a core focus on ending genocide in the world.

"There is a great cultural alignment between Bridgeway and RSM," said Sale. "Our values are closely aligned and that is really important to us. We have a unique culture and mission, and to find a partner that has the requisite depth and breadth of technology capabilities plus cultural alignment is very rare."

## Outcomes

RSM has provided Bridgeway with a comprehensive managed services solution that enables the company to continue to use technology as a strategic resource. The company now has a support framework that can scale with its growth demands, and does not have to look elsewhere for additional critical security and governance advice. With common core values and beliefs, the two companies have built a strong foundation to continue collaborating on several key future initiatives.

Key benefits of RSM's managed services work for Bridgeway include:

- Creating a more effective cloud infrastructure management solution
- Developing dashboards and reporting to provide on-demand access to project information and progress
- Providing flexible technology resources that are available where the company needs them and can scale with future growth
- Providing a depth of services beyond technology, including enhancing the information security framework and control environment

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