CASE STUDY: RSM REVISES NONPROFIT'S TECHNOLOGY STRATEGY TO OPTIMIZE INVESTMENTS

RSM US LLP’s technology and management consulting team helps organizations plan, articulate and execute practical, measurable information technology strategies that envision the future, while addressing process optimization and performance concerns. Our advisory services help better position middle-market clients to achieve their future aspirations by optimizing and streamlining all facets of their technology platform. The team can also evaluate the people, systems and processes needed to support both continuous operations and future growth.

Background

A nonprofit membership organization was struggling to keep up with the rapid pace of change in technology. Its outsourced IT vendors provided good support to end users, but struggled to make recommendations that evolved the organization’s technology landscape with the advent of mobile and cloud offerings.

Our initial project with the client involved evaluating the third-party IT service providers and provided the following benefits:

- An analysis of IT provider performance through interviews with all departments and executives
- An analysis of IT provider value proposition
- A comparison of IT costs against industry benchmarks
- A list of actionable quick-win opportunities
- Longer-term planning for strategic changes

Key recommendations that we provided related to implementing an IT steering committee comprised of cross-functional team members to make IT decisions, and selecting a CIO to provide ongoing strategic guidance for technology modernization.

Benefits

Organizations today are expected to achieve their strategic goals with fewer resources and smaller budgets. These
expectations create a need for more innovation and smarter planning, implementation and execution. The evaluation project helped our client truly understand the people, systems and processes needed to support their business, now and into the future.

The RSM team developed a deep understanding of the client’s organization and technology needs, and helped the organization realize additional value from strategic changes in IT. Our client’s management saw how the team’s recommendations would benefit their organization by enabling it to move forward with technology improvements that would allow the organization to better serve its employees and members.

Since the initial engagement, we have assisted our client with the following:

- Developed a strategy for moving to the cloud
- Initiated upgrade projects to modernize the organization’s business applications
- Implemented additional IT governance, including policies, processes and controls
- Provided additional rigor over IT vendor management to manage the entire vendor landscape and enforce vendor accountability
- Implemented cloud-based e-mail and collaboration tools using Office 365