

Today's tax-exempt organizations face high expectations to achieve goals with fewer resources, creating a need for more innovation and smarter planning. RSM's *Rapid Assessment* can help evaluate the people, systems and processes needed to ensure the IT strategy and goals are aligned with the overall organization.

## CASE STUDY: RAPID ASSESSMENT

*Rapid Assessment*<sup>®</sup> helps nonprofit organization align IT strategy and goals with overall organization

RSM's 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. RSM's management consulting services help better position 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 future growth.

### Background

A nonprofit membership organization was struggling to keep up with day-to-day operations after facing IT issues, business process inefficiencies and staffing problems. After meeting with the organization's executive director and assistant executive director to better understand the organization's needs, the RSM team proposed a *Rapid Assessment* evaluation. This evaluation uncovered a number of inefficiencies.

The *Rapid Assessment* was a "quick hit" diagnostic that provided:

- Analysis of performance relative to the client's industry
- Benchmarking and performance goals
- Actionable and sustainable quick-win opportunities
- Longer-term planning for performance enhancements
- A road map for strategic cost reduction

Once the assessment was completed, the team proposed two options: a conservative and aggressive road map for organizational optimization. The organization's board unanimously decided to move forward with the aggressive approach.

## 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 *Rapid Assessment* helped our team evaluate the people, systems and processes needed to support future growth. Through the assessment, the RSM team was able to understand the client and help it see the value of service upgrades. Management saw how the team's recommendations would benefit their organization by enabling it to grow and move forward.

Core improvements to the organization include:

- Increased new membership
- Increased member retention rates
- Increased staff mobility, enabling employees to work from home
- Improved phone system
- Highly leveraged cloud environment to decrease overall costs
- New friendly web presence integrated with social media
- Stabilized IT costs
- Reduced IT staff and infrastructure complexity

After the road map was implemented, RSM continued to support the organization through regular discussions of IT strategy and goals, to ensure they align with the overall organization.

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