

Investment firm gets a new start with managed services

With success often come new challenges.

A thriving private equity firm operated a diverse portfolio across the life sciences and health care industries. But with multiple subsidiaries and an intricate web of portfolio companies, the PE firm needed to streamline their financial operations and manage their growing organizational complexity.

The firm brought in RSM US LLP to manage the organization's finance and accounting outsourcing for one of their portfolio companies. However, the engagement quickly expanded as RSM identified multiple ways to help the firm become more efficient.

Solving a problem

The firm was struggling with their existing outsourced financial services provider. The provider's high turnover, inconsistent service and delayed financial reporting were creating frustration for the firm's leadership. By using a mix of internal teams and external providers, the firm lacked consistency, particularly in delivering timely financial reports and consolidated data across their management company and portfolio companies.

RSM realized that the firm needed a reliable outsourcing provider that could handle accounting, broadly. RSM's goal was to provide a consistent team and a holistic approach that would serve the firm across all areas of their portfolio and in various functions.

To advance toward that goal, RSM expanded its services to include outsourced accounting and financial reporting for the firm's management company, additional portfolio companies and various subsidiaries. In addition, RSM provided tax compliance and advisory services to support the firm's portfolio companies through complicated reporting environments. RSM also provided technical accounting consulting for challenges like complex transactions and valuations.

The firm appreciated RSM's ability to provide experienced professionals regardless of the specific function being addressed. RSM scaled its services in response to the firm's growing portfolio while remaining flexible to accommodate changes in reporting structures and internal processes. Even as the engagement changed and became more intricate, the firm experienced no disruption in services, which further solidified their trust in RSM.



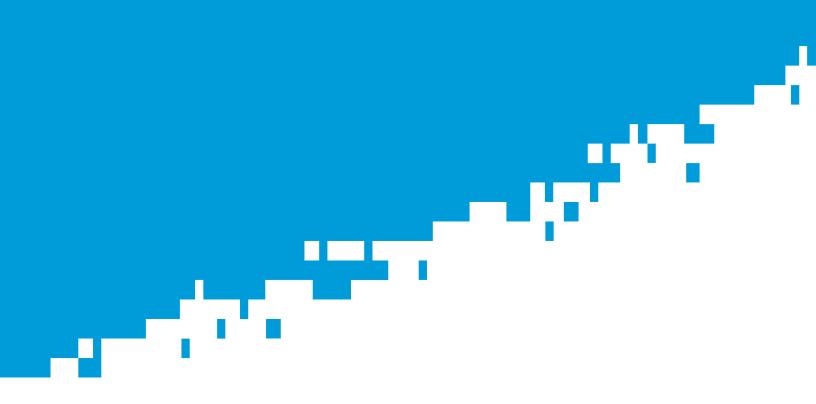
Key results

Due to RSM's efforts, the firm experienced a number of improvements. RSM implemented streamlined processes that enhanced the efficiency of the firm's financial reporting. The monthly financial close reporting was consistently completed on time across all portfolio companies. And RSM's experience with technical accounting helped lead to smooth, timely audits with minimal issues.

RSM's continued focus on scalability, experience and flexibility positions it for a long-term engagement that will strive to meet the firm's evolving financial and operational needs.

The takeaway

RSM's ability to build trust through consistent, high-quality service has solidified its role as a key strategic advisor for the firm. By executing across a broad range of services and functions, RSM has helped guide the firm toward continued success.



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