



Financial firm transforms their operations and builds for the future

Introduction

Over decades, a company builds trust with its clients. Founded in 1984, Geller & Co. (Geller) is a financial and strategic advisory firm serving private companies and nonprofit organizations. Geller helps their clients shape and drive financial strategies through outsourced CFO and accounting services, operational management, business advisory and other value-adding services.

Challenges

Brian Schulte, director, business applications at Geller, says the company needed an advisor capable of translating ambition into measurable outcomes.

"We were on a software platform that was coming to the end of its life," says Schulte. "We had used this platform for 15 years, and we needed to migrate an extremely large, complex client and about 30 additional clients from the legacy solution to a new system."

Geller brought in RSM US LLP to oversee the project. RSM focused on Sage Intacct as a modern, scalable financial platform that could empower Geller to standardize processes, improve efficiency and create a stronger foundation for data-driven decision making.

"Few of us were here when the old system was implemented," says Jennifer Lee, senior director, operations at Geller. "We had some disjointed data and efficiency issues, so it was important to look at this project through a data lens and see how we could improve our overall functions."

A new approach

From the beginning, Geller sought to redesign processes from the ground up rather than simply replicate legacy workflows. The goal was to introduce

best-in-class tools, including accounts payable workflow automation and AI-enabled invoice processing. Geller also aimed to standardize and strengthen data infrastructure by implementing a unified chart of accounts across all clients and eliminating fragmented data structures to enable better reporting and analysis.

"RSM agreed with us that the project wasn't about copying what we currently have," says Nick Sunjka, manager, IT business analytics and applications at Geller. "We saw this as an opportunity to look at every process, look under every rock and improve everything in our financial system."

To accomplish this, RSM positioned itself as an advisor rather than just a vendor. This approach required open communication between the firms and a commitment to transferring knowledge. For example, after supporting the Sage Intacct implementation of the first five clients, RSM transitioned ownership to the Geller team, empowering them to manage future rollouts.

RSM was very open. They didn't keep anything from us, so we were able to run with it after the first five clients. That was very helpful in the long term.

Isabelle Xu,
Manager, IT Business Analytics and
Applications, Geller & Co.



RSM also didn't limit its recommendations to Sage Intacct features alone. In its role as advisor, RSM evaluated complementary applications and guided Geller in vendor selection, validating third-party solutions against project goals. Over time, RSM became a sounding board for the Geller team.

"We meshed very well," Schulte says. "We were close enough with RSM to have honest conversations, and that's reflective of our relationship and where we are with them on a trust level."

Lee and Sunjka echo Schulte's comments about trust and the importance of building a strong relationship.

"RSM got to know our business," says Lee. "They really took the time to understand our needs, and they were willing to accommodate our sometimes crazy requests."

"RSM became a trusted advisor," Sunjka says. "We trusted their opinion. We trusted their experience. We relied on them during the project. Trust was built up throughout the project and still continues because we value the relationship."

Measurable outcomes

The engagement delivered tangible business benefits for Geller across multiple dimensions. The company saw increased efficiency through a standardized chart of accounts for their clients. In addition, the implementation of Sage Intacct provided consistent, high-quality reporting and streamlined workflows. Geller also gained a unified data repository that replaced fragmented systems and improved their financial analysis and reporting by creating better access to clean, structured data.

RSM's methodology emphasized discipline, proper testing and structured sign-offs—practices that aligned closely with Geller's operating style. With RSM's guidance, Geller team members gained the skills to manage system rollouts independently after the initial phase.

"If we needed to reach out directly to Sage Intacct, the RSM team was there to assist us and escalate as needed," Xu says. "They were very prompt in handling issues, and they helped us determine the best solution. RSM will go out of their way to address any problem."

The future

With the core migrations complete, Geller views RSM as a long-term advisor for future enhancements and new initiatives. Because of the project's success, Geller not only replaced a legacy platform but also transformed its financial processes, strengthened their data foundation and built a business relationship grounded in trust and shared methodology. The result is a modern financial ecosystem that supports growth, efficiency and confidence.

"RSM is very measured, and they don't rush just to get something done quickly or because it will make people happy in the short term," Schulte says. "They know that accomplishing goals and getting things right are far more important."

+1800 274 3978

rsmus.com

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