Modernizing financial operations for a tribal organization

Client overview

A federally recognized tribe experienced rapid growth following official recognition in the early 2000s, expanding from approximately $1 million in net assets to nearly $1 billion over two decades. Today, the tribe operates a diverse portfolio that includes tribal government, a casino, investment entities, and a utility business. As operations scaled, leadership sought to ensure financial systems, governance, and reporting capabilities that could support long-term growth and strategic decision-making.

Business challenge

Significant growth created operational strain across financial and operational systems. The tribe was operating with multiple, disconnected ERP platforms across business units, while some entities lacked an ERP entirely. These disparate systems relied heavily on manual processes, limited real-time visibility, and inconsistent data, particularly across finance, inventory, and procurement. Without a single system of record, leadership faced challenges scaling operations efficiently and preparing for future investments and development opportunities.

Drivers for change

- Rapid growth in assets and operational complexity
- Need to scale financial processes and controls
- Demand for consistent, enterprise-wide financial data
- Governance considerations unique to tribal organizations

RSM solution

RSM partnered with the client through a coordinated, industry led, cross-functional approach that aligned financial consulting, management consulting and technology expertise with our tribal services practice.

Services delivered Included:

- **Finance Transformation (Financial & Management Consulting):** Assessment and redesign of the finance organization, requirements gathering, and standardization of the chart of accounts across entities.
- **ERP Implementation:** Implementation of Microsoft Business Central (ERP) to unify financial operations across the organization, with a strong emphasis on leveraging out-of-the-box functionality.
- **Procurement Integration:** Integration of a punch-out procurement solution (ProcureDesk) with Business Central using API-based connectivity.
- **Reporting & Analytics:** Implementation of Solver to support financial reporting and analytics.
- **Change Management & Training:** On-site training combined with user acceptance testing (UAT) to accelerate adoption and minimize resistance to change.

RSM

Delivery approach

RSM followed its standard ERP implementation methodology, including mobilization, solution verification, implementation, deployment, and go-live preparation. The team worked closely with the client to address approximately 95% of business requirements using Business Central's native capabilities, minimizing customization to promote long-term stability and scalability.

Customizations were limited to standard report layouts and necessary API integrations, ensuring the solution remained upgradeable and sustainable.

Technology stack

- Microsoft Business Central (ERP)
- Solver for financial reporting
- ProcureDesk for procurement integration

Value delivered & expected outcomes

While the solution had not yet gone live at the time of the meeting, key architectural and foundational outcomes were achieved:

- A single, consistent system of record across business units
- Standardized chart of accounts and master data
- Improved data consistency to enable future analytics and forecasting
- Scalable financial operations designed to support ongoing growth
- The solution positions the tribe to move from reactive reporting to more proactive, forward-looking decision-making once live.

Why RSM

The client selected RSM for its deep industry expertise and history serving tribal clients and ability to deliver a holistic solution—bringing together financial consulting, management consulting and technology services with deep industry and functional expertise. Strong executive sponsorship, a coordinated RSM delivery team, and a focus on change management contributed to a successful engagement built on partnership rather than a transactional implementation.

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