

Transforming payment and customer management to enhance transparency and operational performance

A cabinet-level public sector environmental agency operating in a highly regulated environment is responsible for overseeing programs across air, water, land, and public resources. As part of a broader modernization effort, the organization faced increasing pressure from legislative oversight and prior audit findings to strengthen fiscal controls, improve transparency, and modernize customer data management practices.

At the same time, core financial and customer systems were fragmented across numerous legacy platforms, limiting visibility, constraining operational efficiency, and creating challenges in delivering consistent service to constituents and stakeholders.

THE CHALLENGE

The agency's challenges were both operational and systemic. Its primary financial system was approaching end of life, while invoicing and payment processes relied heavily on manual workflows that introduced risk and inefficiency. Customer and financial data were dispersed across multiple systems, preventing a unified view of stakeholders and limiting the organization's ability to generate reliable, real-time reporting.

This fragmentation increased audit exposure, reduced fee collection effectiveness, and created administrative burden for staff. Additionally, the absence of self-service capabilities limited transparency and slowed interactions with external stakeholders, further impacting overall service delivery.

SOLUTION

RSM designed and implemented an integrated, cloud-based platform to modernize the agency's payment and customer management ecosystem. Built on Microsoft technologies, the solution unified CRM and ERP capabilities to centralize customer, invoicing, and payment processes within a single, scalable platform.

The implementation automated key financial workflows, including invoicing, collections, and payment allocation, and introduced a secure, external-facing portal to enable self-service access for stakeholders. A centralized data model established a comprehensive, 360-degree view of customers, while integration with existing financial systems preserved critical legacy investments.

Delivered using an Agile, sprint-based methodology, the engagement covered the full lifecycle from strategy and design through deployment and post-go-live support, all within a secure, government-compliant cloud environment.

IMPACT

The transformation enabled the agency to transition from fragmented, manual processes to a unified, digital-first operating model. More than 20 disparate systems were consolidated into a single platform, providing real-time visibility into customer and financial data and improving accuracy across invoicing and payment operations.

Operational efficiency improved through automation, while strengthened data governance and system controls enhanced compliance and audit readiness. The introduction of self-service capabilities increased transparency and improved the experience for both internal users and external stakeholders.

The organization now operates on a secure, scalable foundation that supports ongoing modernization and aligns with government security and architectural standards.

BUSINESS VALUE

By modernizing a critical operational function, the agency improved financial transparency, strengthened revenue capture, and reduced administrative overhead. Leadership now has access to timely, reliable data to support decision-making and oversight.

The engagement also established a scalable digital foundation that positions the organization to extend capabilities, support future initiatives, and continue its broader transformation journey with confidence.