

RSM Bird Cameron achieves one-year ROI for mobile, paperless office

Overview

■ **The Challenge**

Accounting and business advisory firm RSM Bird Cameron wanted to standardise the way it stored and retrieved client information. With 30 offices around Australia, it needed a system that would make it easier for staff to communicate and collaborate on projects.

■ **The Solution**

Working with IBM® Business Partner† Resource Systems & Services, RSM Bird Cameron implemented a customised solution based on IBM Lotus® QuickPlace®. The system provides a central repository to assist staff to find the most recent version of any document. It gives staff a simpler and more organised way to collaborate. Staff working remotely can even access documents using handheld devices.

■ **The Benefits**

Staff save time tracking down documents and no longer need to reconcile duplicate versions. Clients have noticed substantial improvements in the quality and business value of the firm's documentation, improved delivery times and more transparency in their dealings with the firm. These increased efficiencies should lead to the investment paying for itself within 12 months.



About RSM Bird Cameron

RSM Bird Cameron is one of the largest business advisory and accounting firms in Australia. Uniquely placed in the Australian accounting industry, it is a national firm with more than 80 directors, principals and associates and over 700 staff operating out of 30 offices throughout the country. It is the Australian independent member firm of RSM International, the sixth largest accounting and consulting organisation in the world. This affiliation reflects the firm's growing international capabilities and its ability to provide seamless international service to clients.

So many files, so little time

RSM Bird Cameron operates in 30 offices across the country with more than 80 directors, principals and associates and 700 staff.

Part of the RSM International group, the firm has always emphasised providing personalised service for each customer. This philosophy was behind a decision to implement a business-wide online collaboration system that would improve customer service and enhance the firm's competitive position.

Senior management at RSM Bird Cameron also knew the firm needed greater flexibility in managing information flows and a way to more effectively use resources in all locations. The move to a paperless environment would deliver all these benefits and increase the firm's competitive edge.

Any system would need to work seamlessly with the firm's existing IT environment which involved Windows servers and a Cisco Systems network environment incorporating a national wide-area network linking 30 offices.

The firm also had disparate filing arrangements that could be different for each client. A combination of IBM Lotus Notes® applications, other file servers and hard copy made it difficult to track and access important documentation.

“It was hard to maintain an edge in customer service. We had trouble tracking various inputs across multiple document revisions. There was a constant risk critical information might be overlooked or simply overwritten in the updating process.”

*John Heggie, Executive Director
at RSM Bird Cameron.*

**IBM Lotus QuickPlace and Sametime®:
better results faster**

RSM brought in Perth-based IBM Lotus specialist Resource Systems & Services and its dedicated team of developers, project managers, network designers, systems integrators, trainers, technical writers and professional consultants.

Resource Systems understood the issues involved in building a paperless office for an increasingly mobile workforce that needed accessibility and replication across Australia. The team suggested IBM Lotus QuickPlace® would offer the best solution for a highly collaborative working environment.

“IBM is already at the heart of our business and we rely on IBM's Business Partners[†] to successfully implement business transformation projects,” said Heggie. “The process was based on combining existing technologies and products in an innovative way. As a result, our entire working environment has changed from a paper-based, people intensive process to a paperless, systems-driven process.”

The core software platform was IBM Lotus Domino® with the Notes client and Sametime and QuickPlace servers.

IBM Lotus QuickPlace allows staff to collaborate with colleagues, customers, Business Partners and suppliers to generate results. They can use presence awareness to see who's online and instant messaging to converse in real-time; use Web conferences to share a document, application or entire desktop; and use team spaces to centralise and share information on any project. IBM offers a range of real-time and team collaboration products that can be used stand-alone, as an integrated solution or in the context of other applications.

QuickPlace was easy to integrate with RSM Bird Cameron's existing infrastructure to deliver the flexible systems and processes needed to support a paperless office environment.

“Using QuickPlace, RSM Bird Cameron accounting staff across the country can access a single set of files that had been set up for each client. Staff can take the files offline and synchronise them back in.”

*Kevin Lewis, Sales and Marketing Manager
at Resource Systems.*

Easier collaboration for distributed teams

QuickPlace provides a password-protected, ready-made website ideal for collaborative groups. Teams using QuickPlace can house files, share ideas, track responses and feedback, view shared schedules and assign tasks.

The QuickPlace solution allows all information relating to a team's common work to be stored at a single location and accessed via the internet. The solution also allows mobile devices such as Blackberries to access and synchronise files.

This solution was rolled out to all 30 offices around Australia and accessed by 700 users through the existing IBM Lotus Domino servers.

“QuickPlace supports collaboration among people working at different times and in different locations. Changes to a QuickPlace document can now be tracked easily.”

Kevin Lewis, Sales and Marketing Manager at Resource Systems.

“The solution provided a single step to automation far in excess of what can be achieved with the standard QuickPlace.”

New system easy to use and change

There are now 1,000 QuickPlaces on the server with a place type for each client. This means the firm must create a new QuickPlace for each new client. While this means additional work upfront, the single-step process provides full functionality for each new client file.

“One benefit of this approach is that no documents are duplicated on the live network,” said Heggie. “Single file storage means substantial time savings. Staff and clients can access the files from anywhere, anytime.”

“Clients saw an immediate improvement in the quality and business value of our documentation. We improved on delivery times and have more transparent and collaborative customer relationships.”

“Clients can now tap into the firm's expertise and knowledge more efficiently and strategically. The solution has improved business information management which has impressed clients and increased efficiency.”

“We will realise a positive return on the project investment within 12 months and management couldn't be happier with the results.”

“We see continuing value in IBM's integrated product offering. IBM and Resource Systems play an ongoing role in enhancing the application. We believe we can drive the application further, particularly in the workflow area where we expect to make significant productivity gains.”

Kevin Lewis, Sales and Marketing Manager at Resource Systems.

For more information

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