



Deliver a Complete Technology Solution
For Middle-Market Companies

The Nation's Fifth-Largest Accounting Firm Partners With NetSuite



Founded in 1926, RSM US LLP is the nation's fifth-largest accounting firm. Focused on mid-market clients, the company has almost 11,000 employees in more than 87 U.S. offices. A member of RSM Global, the firm is part of a global network that spans 116 countries and has over 41,000 employees worldwide.

For nearly 100 years, RSM has focused on serving mid-sized organizations with quality, reliable accounting services. Unlike the "Big Four" accounting firms, which work primarily with large organizations, RSM's clients average \$50 million to \$1 billion in annual revenues and include startup entrepreneurs, private equity firms that are starting new companies and established companies.

"NetSuite is a great fit for that market segment and it happens to be the market that we want to serve."

Matt Kenney, ERP Advisor, NetSuite Leader
and Principal, RSM US LLP



“We didn’t realize the extent to which we could customize the NetSuite ERP for our clients. That was an eye-opener because we thought we’d be limited in terms of customizations for specific client needs. That wasn’t the case at all.” **Matt Kenney, ERP Advisor, NetSuite Leader and Principal, RSM US LLP**

Due to its size and economies of scale, RSM can deliver very high levels of expertise and resources to a client pool that would otherwise be relegated to working with a small, mom-and-pop accounting firm. “We’re a large accounting firm that’s focused on the middle market,” said Matt Kenney, ERP Advisor, NetSuite Leader and Principal at RSM US LLP. “The fact that we serve mid-market companies is an essential reason our partnership with NetSuite works so well.

Challenge

For the last 25 years, RSM has been helping its clients implement enterprise resource planning (ERP) systems. As part of that process, it helps those companies make the best technology choices for their organizations. In 2010, the technology behind ERP began to advance and delivery methods started to shift from on-premise to cloud-based systems.

With multiple providers to choose from, RSM put time and effort into picking a new ERP provider to partner with. “We basically used the same system selection process we would use with clients, but we used it for ourselves,” said Kenney. “We wanted a partner that would help our clients make the leap to the cloud and really just do ERP better.”

Solution

The selection committee at RSM took the ERP selection process very seriously, whittling down a list of 12 top vendors down to just four viable candidates. It spent time with product demos, asked how partner programs worked, and looked for good synergies between the ERP and RSM’s own client base.

A member of the selection committee, Kenney said NetSuite was the clear choice from the outset based on the solution’s functionality, the fact that it was born in the cloud and its fast rate of regular enhancements.

“The product was making great leaps forward every six months and didn’t require on-premise upgrades,” said Kenney. “It was also pretty clear that NetSuite wanted to work with us and that partners were an important part of its go-to-market strategy.”

Results

At SuiteWorld 2011, RSM made the announcement that it would join the NetSuite Solution Provider Program and begin delivering the solution to its clients. With NetSuite, RSM has been able to:

- Get up and running on the platform quickly.
- Leverage the power of a channel manager who had hands-on sales experience.
- Scale quickly and serve a wider swath of mid-market customers.
- Empower clients to be able to scale their own companies and take advantage of new market opportunities.
- Move into the cloud and eradicate the need for on-premise software upgrades and enhancements.
- Focus less on technology and more on providing a great depth of accounting, finance and business strategy support to its client base.
- Help those clients apply technology in ways that enhance and support their own success.

Advantages to Partnering with NetSuite

- **Channel managers who can help make those first few critical sales.** For RSM, it was immediately apparent that the NetSuite team both used and understood the product that it was supporting. This carried over into the sales enablement, training and product education that RSM received. “Our channel manager had sales experience so everything she shared when guiding us through our early sales wasn’t just theory,” said Kenney. “It was based on real-life experience.”

- **Ability to solve big problems for mid-market clients.** As a NetSuite partner, RSM can help its clients grow quickly (be it domestically or internationally) without having to worry about how users are going to access the systems they need to be able to run their businesses. Because NetSuite offers a unified approach and broad range of functionalities, it serves as a single solution for multiple different points in the supply chain (e.g. warehousing, fulfillment, manufacturing, financials, customer relationship management, etc.). “As a NetSuite partner, we can deliver that all in one solution,” said Kenney. “We help make our clients’ technology easier to manage which, in turn, allows them to focus on their businesses.”
- **A tailored solution that meets clients’ specific needs.** Small to mid-sized companies can’t always afford to configure and customize software solutions to their specific needs, but that’s exactly what RSM can offer with the NetSuite platform. “That was eye-opening at first,” said Kenney, whose team went into it assuming that it would have no control over the technology infrastructure and software coding. That assumption proved incorrect. “We ramped up an integration and customization segment of our NetSuite practice,” he explained. “Clients can tie NetSuite into other unique business systems, tailor it to the way they want to do business and align their businesses strategies with the ERP.”

- **Helping clients expand their global presence.** With more and more of its clients transacting with global business partners, RSM uses the NetSuite platform to help those mid-sized companies address the challenges of global expansion. “You don’t have to be IBM to go global these days,” said Kenney, who has worked with 30-employee companies that have two offices located outside of the U.S. (along with their domestic operations). For these companies, RSM can set up foreign subsidiaries, handle the complexities of foreign accounting requirements, manage consolidations and acquisitions, and leverage NetSuite’s multi-language/multi-currency capabilities.
- **Growing right along with the Oracle NetSuite platform.** Since becoming a NetSuite partner ten years ago, the accounting firm has transitioned from using the platform’s core features to delivering “anything and everything NetSuite offers” to its customers, said Kenney. That includes some of the newest functionalities in SuiteBilling, SuitePeople and SuiteCommerce, all of which RSM’s internal team is trained on

and helping customers adopt. The integration of Oracle and NetSuite presented additional opportunities, including Planning and Budgeting (which were originally part of the Oracle family of products). “I can’t tell you what will be next,” said Kenney, “but whatever NetSuite does come up with, we’ll build our skills to deliver that new functionality to the market.”

To learn how an Oracle NetSuite partnership can benefit your organization, visit us at www.netsuite.com/partners.



Company Snapshot

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