



Audit/Tax Firm Grows Revenue from IT Consultancy

Channel management helps RSM McGladrey capitalize on brand recognition and service delivery strengths.

Customer Name: **RSM McGladrey, Inc.**
Industry: **Professional Services**
Location: **100 offices**
Company Size: **8000 employees**

Business Results

- Enhanced project management process
- Engineer training plan and leadership skill sharing
- Service portfolio expansion plan
- Joint Cisco-RSM McGladrey marketing plans

Business Challenge

RSM McGladrey started in Cedar Rapids, Iowa, in 1926. Today, the company provides accounting, tax, and business consulting services from nearly 100 offices across the United States. Within the consultancy arm of the business, the IT infrastructure services group has contributed impressively to the company's growth in recent years. In a little more than one decade, the team has grown from 6 consultants to a staff of more than 75.

"Cisco has been our predominant provider for IT infrastructure solutions," says Patrick Vance, the managing director of the IT solutions business. "Bottom line, clients judge us by the solutions we provide combined with our business and technical expertise. We have to design, install and maintain quality systems. Our clients view Cisco as a clear industry leader in the network infrastructure world. And that's how we want to be perceived in our market. Partnering with Cisco has been an easy choice."

With the Cisco solution set part of their offerings, RSM McGladrey has seen exciting growth. Over the last five years, double-digit growth per year has strained the group's structure and business framework. "Our business was exceeding our organization's capacity, and we were struggling to expand fast enough to keep up with demand," says Vance. "We knew we needed to improve, but we needed help to stand back and analyze our situation. Our Cisco channel management team, when we talked to them about the situation, had a process to help us address these challenges."

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Case Study





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Solution and Results

As an established Cisco partner, RSM McGladrey was able to take advantage of Cisco assistance. The channel team proposed a process to bring together Cisco experts and representatives from RSM McGladrey's eight different practice groups including operations and sales teams. A couple of conference calls laid the groundwork for a two-day Partner Discovery workshop.

"The Cisco partner engagement allowed us take a step back and perform an internal evaluation," says Vance. "There were no shocking revelations, but it reinforced a lot of our strengths and pointed to areas with opportunity for improvement. For example, we learned that we liked to execute but not to plan. We also learned that we have a solid leadership team, but we weren't preparing our lower-level managers for leadership. Most important, we learned that we needed to take advantage of the McGladrey brand to promote our IT consultancy services to the larger company base of customers."

The engagement yielded a 90-day action plan for addressing areas of opportunity, and included 30- and 60-day milestones. Project management has been improved, with planning now encompassing more client activities. Skills are being shared across teams and offices, and engineers are getting more training.

Even adjusted around the company's hectic year-end, the company is already seeing the benefits of the efforts in terms of increased profitability and customer satisfaction. The Discovery process has also changed the relationship with Cisco.

"We gained great visibility of our business within the Cisco organization and our companies will carry out some joint marketing activities in the future," says Vance. "Overall, the results have been spot on for our business. Our relationship is strengthened by increased mutual respect, and our action plan is logical—Cisco's recommendations make all the sense in the world. We've gained ideas for new service offerings for the next 18 to 24 months, and you'll see us marketing 'smarter' and taking advantage of customer satisfaction surveys and other tools recommended by Cisco. We are set to execute better going forward and to take full advantage of the growth opportunities in our market."