

Data#3 Customer Story

RSM Australia

*RSM Australia unleashes the power
of analytics with help from Data#3*

Data#3



Data#3



Objective

RSM Australia wanted to make better use of their Microsoft Dynamics 365 (D365) investment by aligning it more closely with their business strategy and increasing overall adoption across the organisation.

Benefits

- Deployed over 100 enhancements and changes
- Improved D365 performance and functionality
- Automated workflows
- Added scalability to expand to meet business demands
- Greater staff adoption
- Faster turnaround on changes
- Improved confidence and credibility in reporting
- Increased user engagement with D365
- Upskilled in-house teams on best practices and project management

Testimonial

“We have learned from Data#3 how to prioritise requests from inside the business and have a better idea of how much time and effort it will take. We have the confidence to think outside the box now, and before we go to Data#3 we consider if we can fix something internally.”

Helen Carvosso, Director of Marketing,
RSM Australia.

Approach

The relationship between Data#3 and RSM Australia spans more than 15 years, so when they needed additional expertise and trusted advice, it made sense to turn to their preferred Microsoft provider.

Project Highlight

“We knew we needed additional support to continue delivering the project to the standards we expected but were nervous about finding the right fit. It’s easy to work with Data#3. They aren’t just our provider, they are an extension of our team, and we know we can count on them when we need it.”

Helen Carvosso, Director of Marketing,
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Solutions & Services

- ✓ Microsoft Dynamics 365
- ✓ Microsoft PowerApps
- ✓ Microsoft Power Automate
- ✓ Project Services

RSM Australia

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The Background

Established in 1922, RSM Australia has grown to become a leading player in Australia’s professional services industry. With more than 1,900 staff in 32 offices, RSM Australia provides financial and advisory accounting services, acting as a trusted partner to a wide range of business, government and individual clients.

Having introduced Microsoft Dynamics 365 (D365) previously, RSM Australia was finding underlying structural issues and limited technical resources were creating challenges in adopting its full potential.

The Challenge

Unsurprisingly, much has changed during RSM Australia’s century in business. While the values of friendly expertise and exceptional service have remained the same, the business’s remarkable longevity owes much to a willingness to embrace new opportunities. Director of Marketing Helen Carvosso said that staying ahead in a competitive sector requires an ability to look forward.

“We are currently busy working on our growth plans to 2030 and a strategic focus for us is our digital transformation, where using analytics and automation will be very important moving forward. We have invested heavily in learning about AI and leveraging data for our growth strategy.”

A significant investment to date has centred on Microsoft Dynamics 365 (D365), a portfolio of intelligent business applications that streamlines operational processes and drives greater efficiency. While the capabilities of D365 were thoroughly researched and matched the business’s needs, the roll-out had been problematic.

“We rolled out the D365 instance in January 2023. It wasn’t quite perfect and we knew that at the time, but we wanted people to start using it. The more people that started to use it, the more requests we were expecting and received for improvements, changes or additional features. We also knew there were some structural issues we would need to address down the line.”

“Our CRM team didn’t have the technical capability we needed to begin addressing those structural issues – so we were looking for a partner who could act as an advisor, understand what we were trying to achieve, provide options, and help us find the best way forward.”

For RSM Australia, it was especially important that the chosen partner could identify potential implications of each course of action and minimise any impact on users and the wider IT environment.

“Our previous advisors had added fields as we requested, without providing the strategic advice on the impacts of some of these requests. We needed partners who weren’t just ‘yes’ people but could advise, guide, and challenge us to ensure we used best practices to build a future-proof system that would take us forward. We needed to add that additional technical competence and depth to our team.”

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**Helen Carvosso, Director of Marketing,
RSM Australia.**

IT Outcome

With user requests coming in thick and fast, it was clear that the RSM Australia team needed the right processes in place and guidance from a trusted partner. After considering multiple partner options, it seemed to Carvosso there was a logical choice.

“There were downstream implications to any changes, and we needed to understand these. We had a long relationship with Data#3 in other areas of RSM and ‘Microsoft-Land’. That relationship spanned 15 years. The main driver to work with Data#3 on our Dynamics environment was their position as our Microsoft licence provider – they already provided our D365 subscription.”

“What I like about the Data#3 team we work with is their empathy and non-judgemental approach. We’re working with an external provider as we don’t have all the answers – and sometimes we don’t know the right questions to ask. They encourage those questions, which helps them understand where I’m coming from too.”

The Data#3 team worked with a proven methodology, and this gave the structure that Carvosso knew was needed. They set about learning in greater depth about RSM’s business and technology eco-system, and understanding what a great outcome would look like.

“It was really very smooth. We set up regular meetings at the start to understand where we were and to roadmap our immediate priorities. We were easily set up on the ticketing system, which was all totally transparent, so we had visibility of where things were at. Now, we have established a regular cadence of meetings to suit business as usual, but when things pop up, the team is there to answer our calls and emails very quickly.”

In that early phase, more than 100 enhancements and changes were scoped out and implemented, positioning RSM to achieve greater benefits from their D365 environment.

“There are a lot of automation pieces here that help us to get work done. We can create workflows and understand the potential implications.”

By digging deeper, Data#3 was able to help RSM better align D365 with the activities of the business, so that staff time could be saved on repetitive tasks and refocused on the customer service they are known for.

“We applied some automation based on principal clients. It used to be extra work for a partner to go in and check a box to say a client now needs tax updates. Now, when a contact changes to client status, that checked box can happen automatically. We have been able to add functionality to apply different rules for clients and contacts with changes triggered automatically, saving manual effort.”

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Business Outcome

The challenges that RSM faced in the initial D365 rollout had hampered enthusiasm for the product – but this is something Carvosso said had been turned around, with positive results encouraging greater engagement.

“Rolling out new technology and getting people to adopt it can be scary, if not outright off-putting. Now we have support to make it fit for purpose, so it helps people with what they are trying to do in their day-to-day jobs.”

“Before we didn’t have the technical expertise to be able to make it work for them. We can now go to the stakeholders and understand their business priorities and make the system work for them, not the other way around,” explained Carvosso.

That expertise doesn’t only come from the Data#3 team. Carvosso’s group was keen to gain skills and confidence in working with D365, so they could handle the more straightforward requests while still calling on Data#3 for more complex changes.

“We learned a lot very quickly from the team. They shared best practices and how they prefer to be briefed – it was a different realm to what we were used to. We learned a lot about best practices for change requests from them,” Carvosso said.

“That has been great as it does help us too, to get a better brief, we know the right questions to ask. The Data#3 team has been helping us upskill, so we can use them for their technical expertise rather than day-to-day actions. It has been an opportunity for us to learn and develop as we continue the relationship.”

With early difficulties unravelled and a faster time from request to completion, the RSM team has observed a change in the way they are perceived by the users they support.

“We have been given the confidence and credibility to go back to our team when they have questions or development requests, and we have a hundred percent certainty that we have a process in place. We pitch it to our change advisory group and come back with solutions. The refined process means we have a hundred percent confidence when we report back to the business.”

“Like any new relationship it took time to get to know one another - but when we started to report small wins back to the business, we could see the confidence building among end-users, in the platform and in us,” said Carvosso.

It is not only users who are able to work more effectively now. Carvosso’s team has also had a weight lifted from their shoulders.

“We are spending time better, not stressed about the time we are spending and worrying about having to fix problems. If we are notified of an issue, we put it on the list and know it is being taken care of. We’re able instead to spend our time educating and upskilling people on how to use D365 better rather than having to apologise for what it can’t do.”

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“Data#3 showed that they very much see it as a long-term partnership, so when they scope something out, they are not creating a rod for their own back by making changes without question.”

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Conclusion

Part of RSM's longevity is down to the business focusing on its strengths and understanding where it pays to seek expert help. Working with a partner that complemented RSM's strengths and shared the same long-term view has been a game-changer for Carvosso.

“Data#3 showed that they very much see it as a long-term partnership, so when they scope something out, they are not creating a rod for their own back by making changes without question. They take time to make sure the outcome will really be what the business needs, even if it is not what we originally asked for – they push back if it is not the right thing.”

For someone that does not come from a technology background, Carvosso found the process unexpectedly enjoyable.

“Their biggest strengths were their patience and expertise. They will invest the time to understand where we are coming from and the challenges we face, they have empathy around that and offered solutions based on their technical expertise.”

“They had an understanding of us as a professional services firm, an understanding of our language and the nuances. They built a rapport, had a real sense of humour, and made it fun, not scary. It's easy, they are like an extension of our team, and we know we can count on them.”

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Data#3 and Microsoft

Since 1994, Data#3 has combined forces with Microsoft to help our customers adapt and grow. Today, we are Microsoft's largest Australian business partner with the highest level of competency across the Microsoft ecosystem. Our hundreds of accredited consultants are ready to help our customers deliver the digital future; from enhancing productivity and collaboration with Microsoft 365 and the latest Surface devices, to transforming business processes with Dynamics 365, to ensuring our customers get the most value from Azure cloud. Our scale and expertise enable our unparalleled support to customers selecting, deploying, managing and securing Microsoft applications, products and devices.

Data#3

 **Microsoft**