



RSM US has used the Cloudmore platform to:

- Streamline internal processes and improve billing efficiency through automation.
- Ensure better governance when managing customer onboarding and automating new subscriptions.
- Improve customer service by offering self-service subscription management.
- Save time and improve reporting by eliminating manual data manipulation.

The Client

RSM US LLP is an audit, tax, and consulting advisor to middle-market companies in North America. It is the US member firm of RSM International, a global network of independent consulting practices that collaborate to provide services to global clients across 120 territories worldwide.

The firm traces its origins back to the 1920s as an accountancy practice with just seven staff. Today, RSM US is the fifth largest accounting firm in the US, made up of more than 12,000 professionals in 87 cities in the US and four locations in Canada.

RSM US focuses on delivering a highly personalized, client-centric experience. The firm's highly engaged partners and client service teams gain a deep understanding of clients' businesses, which helps them build long-term client relationships that deliver value for clients in addressing their issues.

The Challenge

One of RSM US's lines of business is technology consulting. It is an area that has grown exponentially over the past couple of decades. Since 2015, RSM US has been a Microsoft Cloud Solution Provider, offering Microsoft 365 and Azure solutions to its small and medium businesses, whose users typically number up to 200.

Michelle Good, Operations Manager at RSM US, explains that the firm did not initially have a platform through which clients could buy and manage their licenses. She explains, **"A lot of our customers started asking for self-service capabilities, so we began the process of looking for the right solution."**

RSM US wanted a customer self-service platform that was easy for clients to use and streamline its internal processes. Michelle says, **"A really important feature for us was the ability to gain the kind of billing insight that would alleviate the manual billing manipulation we were doing and minimize the level of effort we needed to put in to deliver comprehensive billing details for our 700 clients."**

Why Cloudmore?

RSM US looked at four different platforms. Michelle explains why the firm chose Cloudmore: **“It was the robustness of the tool and the ease of use of being able to make adjustments to billing components. On top of that, we liked the reporting feature and how Cloudmore would help us automate renewals.”**

Compliance and governance were also important factors. Michelle continues, **“From a governance perspective, we felt that Cloudmore could help us manage customer onboarding when they came into the platform via a contractual procedure. Cloudmore would help by automating that process when putting new subscriptions in place.”**

Michelle’s colleague, Terra Siegert, Project Management Sr. Associate, adds, **“Another part of the decision-making process in choosing Cloudmore came down to the ability for Cloudmore to make platform adjustments based on our requests.”** It wasn’t a requirement that had been raised during the sales process but, Terra adds, **“It’s nice how we can flag up a feature that we would like to see in the platform and have the Cloudmore development team investigate it and look to incorporate it.”**

In implementing Cloudmore for subscription management and customer self-service for Microsoft 365 and Azure, data security is guaranteed. All data is securely stored at Cloudmore’s US data center and accessed via the multi-tenant SaaS platform.

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Billing and Reporting Efficiencies Through Automation

Cloudmore has proved to be a differentiating factor for RSM US with prospective customers. Michelle adds, **“The direct CSP partner arena is extremely competitive, and some of the large account resellers are very active in reaching out to our customers. The self-service functionality of Cloudmore has freed up some extra time for our small team, allowing us to be more proactive in looking at our customers licensing and finding how we can license them more cost-effectively. During the sales process with prospects, we can also now communicate and promote the self-service aspects of the portal.”**

From a billing and reporting perspective, **“Cloudmore offers some capabilities that we just aren’t able to get from Microsoft Partner Center. Manually pulling detailed data relating to Microsoft license bills was previously impossible. In the Microsoft Partner Center, there’s no way to access every subscription that we have. But in Cloudmore, I can pull a report, and I can see when subscriptions are coming up for renewal and can easily get renewal quotes to customers.”** says Terra.

The RSM US Licensing Team no longer needs to manually manipulate its Microsoft bill to invoice its customers.

Terra explains, **“We can use the portal to explain to customers about their bill – and Cloudmore explains it in a far more digestible format that customers can understand.”**

Being able to deliver information on Azure usage is a significant advantage too. Cloudmore shows Azure usage and costs. Terra says, **“Our customers can see their current and past Azure usage and can download the reports themselves from Cloudmore. It’s not something they can even do from the Azure portal. It’s a very nice feature for our Azure customers.”**

Terra confirms how Cloudmore has saved her time in retrieving and delivering reports and data. **“Some of the options and capabilities that Cloudmore has – and that we didn’t have before – mean I can now just pull a huge report, covering everything: licenses, customers, renewals. It’s a lot more simplified and saves me time,”** she concludes.

Future Ambitions

Michelle reveals, **“We’re looking to add more managed IT services to Cloudmore. It would allow us to implement our custom products that clients can use to manage Microsoft 365 services.”**

Michelle is also keen for RSM US to capitalize on some of the functionality within Cloudmore that it has not yet used. One aspect is a capability that helps with governance and compliance. Michelle clarifies, **“Certain contracts need to be signed before we can provision licensing for customers. Long term, we believe there is the potential to automate some of those contractual requirements through Cloudmore before we onboard customers by having Cloudmore initiate that as a workflow for us.”**



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