

Boost Productivity with Integrated Workflow, via RMS



Our client is a large US audit, advisory and assurance firm employing more than 65,000 professionals. Their existing internal workflow system was only accessible to select team members and had significant limitations, which led to communication gaps, missed deadlines and limited transparency. The client needed an effective workflow management system that could handle a large volume of projects involving functionalities/features such as knowledge management, search and reporting.

Client

A leading US audit, advisory and assurance firm

Industry

Professional services

Evalueserve Solution

We implemented our Research Management Solution (RMS) for the client, which offered:

- Integrated, end-to-end workflow management system for research and analytics projects
- Streamlined and automated key processes driving quicker and easier collaboration
- Online access for all the client's staff
- Simple customization to the client's needs



Use a single, integrated platform to manage all knowledge projects to boost efficiency and leverage information assets.

Business Impact

- Accessible by more than 65,000 professionals in the client organization
- Anyone can submit requests via desktop and handheld devices
- Enhanced user experience – track project status on the go
- Re-use of knowledge assets has introduced efficiency gains of 25–30%

Business Challenge

Many professional services firms need to carry out research and knowledge projects to aid case work, marketing and business development efforts, thought leadership creation and so on. These projects typically involve multiple stakeholders collaborating to produce knowledge assets, and managing them with traditional productivity tools can be time-consuming and cumbersome.

Our client is a leading US audit, advisory and assurance firm. Their existing internal workflow system had significant limitations and was only accessible to select professionals, which led to communication gaps and minimal transparency for the leadership on research spend.

They needed a workflow management system that could handle a large volume of projects involving knowledge management, search and the ability to generate reports by line of service, purpose of research and other factors.

Our Solution

We implemented our Research Management Solution (RMS) for the client.

They now have an integrated, end-to-end workflow management system for research projects that streamlines and automates key processes and supports quicker, easier collaboration.

The firm can manage research requests throughout their lifecycle, from submission and allocation through tracking and project delivery, including inviting and capturing feedback.

The client no longer has to rely on email to submit research requests, track projects or provide feedback. Instead, all requests can be submitted, managed and tracked through one easy-to-use interface.

Previously, only a few client staff had access to the knowledge management system. RMS is web-based, allowing access for all staff.

Now each team member can manage a request from request allocation right through to delivery. This has sharply reduced the average number of requests managed by each team member, as well as the risk of miscommunication or missed deadlines.

RMS is fully customizable and our client has taken advantage of this to build quick trackers to monitor workflow in real time.

The centralized document repository can be searched across requests, deliverables and documents. Now staff can quickly locate existing content that could meet emerging requirements, allowing the firm to realize the full value of its research assets.

With a centralized, instantly searchable knowledge base, it has become far easier to spot duplication and redundancy. An estimated 30% of annual workflow relates to similar projects or requirements, which requestors can now self-serve to meet demanding project timescales.

RMS offers feature-rich, predefined MIS reporting on requests, feedback, timesheets or users. On-the-go, real-time access to MIS reports helps gatekeepers maintain an accurate view of governance and performance against service level agreements (SLA). It also helps leadership gain visibility of areas supported by the research function.

Benefits Achieved

RMS has helped the research function to better cater to requestor needs in a timely manner. It has sharply improved the research function's responsiveness, allowing them to deliver timely, actionable insights to the requestors. It also provides visibility to the leadership team to know which service line is using the function the most, and what end-use of output the team is creating or supporting.

With requestors managing their own needs through the self-serve functionality, an estimated 25–30% of total annual support hours have been saved.

Now research managers can track the status of their requests, they have saved an estimated 300 hours per year.

Evalueserve – powered by mind+machine

Evalueserve is a global professional services provider offering research, analytics, and data management services. We are powered by mind+machine – a unique combination of human expertise and best-in-class technologies that use smart algorithms to simplify key tasks.



More details about RMS:

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