

Case study: Rosenfield & Co.

RSM's managed services team helps professional services firm tap into innovative IT solutions

An accounting firm was having problems with its managed services provider, and RSM stepped in to resolve long-standing issues. The engagement continues and, years later, the two firms are still working well together.

Accounting firm establishes a powerful IT platform

Managed services go beyond a simple upgrade

If it wasn't the last straw, it was very close. "We had horrible issues with our previous IT service provider," Nicholl Amurao says. "There were some catastrophic failures."

Amurao is the firm administrator for Rosenfield & Co. PLLC, a certified public accounting firm that offers tax, attest, assurance and consulting services to clients in niche industries. She says that years ago, Rosenfield's IT service provider had the firm reliant on a single on-premises server that supported multiple offices. The server's hard drive failed, and the company lost access to the server right before a critical deadline.

Often, when there were system issues, Amurao would need to drive into the office at 3 a.m. on a Sunday to push a reset button on a server or the firewall. Amurao says that Rosenfield's IT environment is very different today.

"Now, I can just call somebody and say, 'We have a problem,' and they'll say, 'We'll just remote right in and fix that, and it will be fine,'" Amurao says. Rosenfield no longer deals with the IT provider that gave Amurao headaches. That's because eight years ago, Rosenfield hired RSM US LLP to upgrade its IT system. The engagement is still thriving today because of the strong bond between the two teams.

A creative environment

Rosenfield has offices in five U.S. states and operates internationally. The company is a client of the RSM Professional Services+ (PS+) practice. The PS+ practice provides a wide range of services to independent professional services firms (accounting, consulting, law firms, others) who want to access leading tools and processes in addition to tailored solutions to accelerate their growth.



"Back in those early days, our staff carried around little transmitters that they plugged into the wall to give them internet on their very old brick laptops," Amurao says. "So, our leadership is super forward-thinking and comes up with what appear to be wild and crazy ideas, and we look for a way to make it happen. Our motto is, 'If it's broke, fix it, and if it's great, break it and make it better.'"

As such, when RSM's managed services team began work, it found a receptive environment. Among RSM's top priorities was bolstering the efficiency of Rosenfield's IT environment while ensuring that the platform was secure and available to its staff. This involved updating and standardizing the company's equipment, as well as developing best-practice procedures.

Soon afterward, RSM helped transition Rosenfield to Microsoft Azure cloud. This helped the company's employees work from anywhere in the world, which was essential for an organization that was growing rapidly and dealing with more complex data.

"We had been processing the data for our accounting software through our laptops, which was becoming seriously ineffective as we started dealing with more complicated projects and larger clients, which bring more data," Amurao says. "We needed to move on from that."

As Rosenfield's technological sophistication increased, and as the organization's needs evolved, RSM adjusted its approach and worked with the company to build an IT road map for the future. Amurao says that the long-standing goal is to ensure that Rosenfield is technologically advanced, which not only increases the company's productivity but serves as a value-added differentiator for its clients.

Ready for remote

Rosenfield's affinity for technological solutions and remote working paid off when the pandemic began. The fact that much of the staff had long been telecommuting made the office shutdowns less painful, but of course, such a major transition still necessitated quick thinking.

"When COVID hit, we were already prepared to be a virtual firm, but we weren't prepared for how much data we had to move and the memory increases this required," Amurao says. "So

RSM worked with us, and we made a plan. As a result, we never skipped a beat. And if we didn't have such a good RSM team supporting us, we really could have had some issues. But there were no hiccups in service for us."

Although Rosenfield has reopened its offices, the benefits of its pandemic solutions still cascade throughout the organization. Staff members can continue to telecommute, and all of the company's processing is now done on virtual servers.

"If our employees want to work remotely, they can just log in from a portal," Amurao says. "You can access data from home, or out in the field, by logging into any device and working in the virtual desktop."

RSM also maintains the company's help desk, which Amurao says is crucial for day-to-day operations. In addition, RSM is working to create multifactor authentication, conditional access and additional security for Rosenfield's IT platform. Future endeavors include establishing a client-facing portal.

"The portal will be different than the dashboards that other firms are offering, and RSM will help us with the project," Amurao says. "So onward and upward, essentially."

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– Nicholl Amurao
Firm administrator, Rosenfield & Co.

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Back to the office

RSM's influence is not confined to Rosenfield's virtual environment. The two teams are focused on establishing Rosenfield's new office in Texas.

"We have built three offices in the time that we've been working with RSM," Amurao says. "Each time, we have had on-site, hands-on assistance with building the offices, network capabilities and installations, making sure everything is set up in the best possible environment and that each office is connected, instead of everybody being on a different system that no one can figure out."

For the Texas office, Amurao met with RSM regularly to discuss networking and power needs, as well as hardware and software requirements. Amurao says the two teams have established a solid working relationship based on open communication, and as a result, they are comfortable working closely together.

Amurao says that Rosenfield has plans to open more offices, most likely in the Washington, D.C., metro area, and to focus on organic growth. She adds that RSM will continue to be a key part of the company's efforts.

"There's been a lot of communication with RSM about our future plans," Amurao says. "It's really been a hand-in-hand relationship. And as we grow, and as RSM and the managed IT team grow with us, we're going to keep going down the same path together."

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