

# RSM Microsoft Playbook

# Why RSM?



**RSM and Microsoft are working together to capture a share of the massive \$10 trillion digital opportunity. By creating highly repeatable end-to-end Industry Solutions built on Microsoft Cloud, RSM delivers compelling business outcomes and experiences across all six Microsoft Solutions Areas, Power Platform and AI.**

RSM is recognized as the unrivaled industry authority as go-to industry experts, exemplified by our remarkable Microsoft awards. **Through our relentless pursuit of advanced specializations, unwavering commitment to Microsoft's programs, and seamless alignment with their innovative solutions, RSM has become the coveted frontrunner in the field.**

Have you ever wondered why Microsoft has chosen to team up with RSM? The answer is simple: we have a proven track record of success. Our team has driven a significant number of licenses, increased Azure spend, and has brought in a multitude of clients. We are proud to have helped Microsoft achieve their goals and we believe that this success is just the beginning.

# Why RSM?



**RSM's Microsoft practice helps mid-market to enterprise-sized businesses leverage Microsoft solutions to meet their business objectives and drive revenue growth. By combining technical knowledge, industry expertise, and business savvy services, we're able to assess complex situations and implement the right Microsoft industry solutions quickly and cost-effectively.**

Being part of RSM, the fifth largest global accounting and consulting firm and the only one of the Big Five focused on the middle market, gives us advantages that other Microsoft partners don't have, such as:

- Strong, long-established relationships with finance and executive teams across 76,000 RSM clients in the United States alone
- Wide geographical presence with over 100 offices in the US and Canada and 820 offices globally, which enables us to serve clients in 120 countries
- Agility to support a variety of clients including SMB, SMC, & Enterprise across multiple industries

# Why RSM?



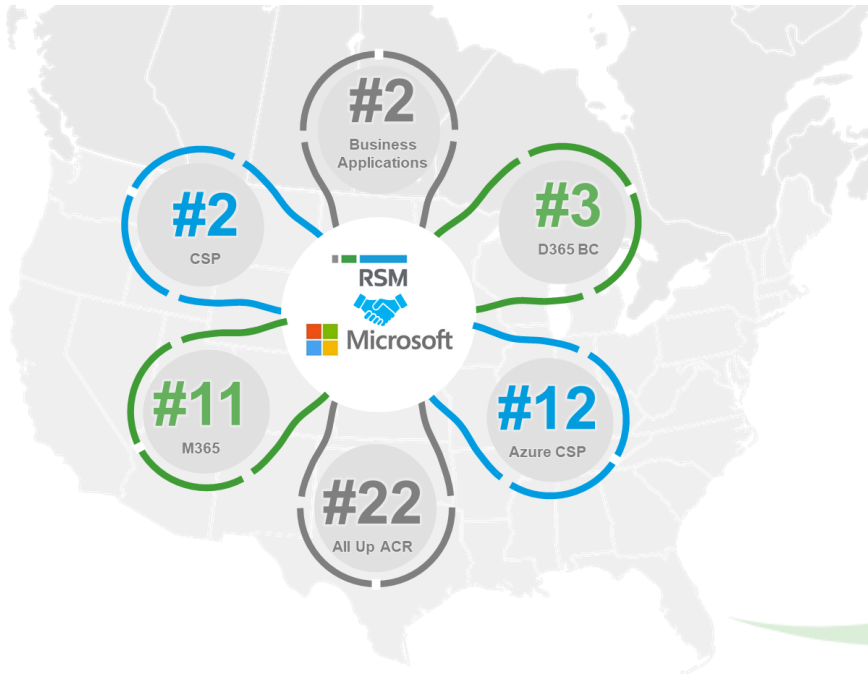
**RSM is deeply committed to its Microsoft partnership. Our strategy is to go deep and wide with Microsoft to become a “one-stop-shop” for Microsoft Cloud solutions. We have the advantage of already having a large client base and are continually educating our advisory consultants on how to identify and introduce more Microsoft business opportunities.**

RSM delivers powerful, easy-to-use, and affordable end-to-end industry solutions built on Microsoft Cloud across all six Microsoft solution areas. These solutions are delivered by RSM with an industry focus, enterprise software domain experience, tier-1 people, processes, and tools, with an emphasis on creating quick wins for clients using Industry RVM. RSM's focus on providing compelling business outcomes helps clients achieve success with their digital transformations.

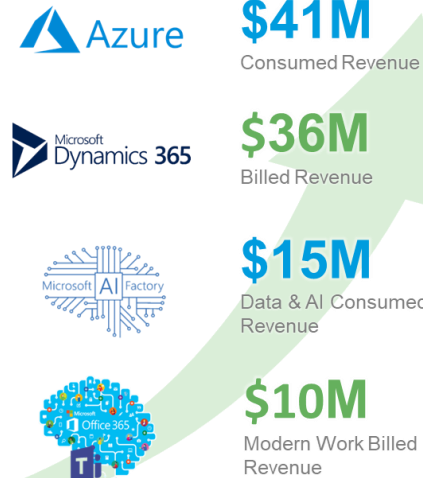
RSM serves as a single-source technology consulting partner, delivering Azure, Modern Workplace, Dynamics, and Power Platform products wrapped into industry-specific solutions. Our organization has **over 1,300 dedicated Microsoft practitioners in its North American Microsoft Practice alone**, providing clients with the expertise they need to succeed. RSM's focus on providing industry-specific solutions ensures that clients receive tailored solutions that meet their unique needs and help them achieve their business objectives.

# RSM's Microsoft Practice At-A-Glance

Six Solution area partner of the year with the advanced specializations required for AMM and Azure Innovate funding



## Microsoft Scorecard and Channel Position



**Microsoft Solutions Partner**  
 Solutions Partner for Infrastructure (Azure)  
 Solutions Partner for Data & AI (Azure)  
 Solutions Partner for Digital & App Innovation (Azure)  
 Solutions Partner for Business Applications  
 Solutions Partner for Modern Work  
 Solutions Partner for Security

## Microsoft Cloud

### Specializations

Analytics on Azure  
 Small and Midsize Business Management  
 Supply Chain  
 Finance  
 Adoption and Change Management  
 Calling for Microsoft Teams  
 Teamwork Deployment

Modernize Endpoints  
 Cloud Security  
 Identity and Access Management  
 Threat Protection  
 Infra and Database Migration to Microsoft Azure  
 Microsoft Azure Virtual Desktop



## Microsoft FY23 Partner of the Year Awards

US Partner of the Year Business Applications - Dynamics 365 Finance Winner  
 US Partner of the Year Industry - Defense and Intelligence Winner  
 US Partner of the Year Business Applications – Dynamics 365 BC Finalist  
 US Partner of the Year Industry – Government Finalist  
 US Partner of the Year Social Impact – Community Response Finalist  
 Global Industry Partner of the Year Government Finalist  
 Global Industry Partner of the Year Healthcare & Life Sciences Finalist  
 Global Partner of the Year Business Intelligence

\* Four field-led AMM and Azure Innovate Assessments funded

**RSM** 33 Co-Sell Apps

**RSM Government Contractor Industry Solution**  
 RSM US, LLP

Sales Power Automate  
 Operations Finance

Industry Solution for Government Contractors

**RSM** 48 Co-Sell Services

**RSM CPG Industry Catalyst Workshop**  
 RSM US, LLP

Solution and Technology Assessment for Consumer Products Industry



# Microsoft Recognition

Largest Microsoft Partner serving the SMC market



## Partner of the Year

### WINNER

2023 D365 Finance

2023 Defense & Intelligence

2022 Tech for Social Impact

2021 Connected Commerce

### FINALIST

2023 D365 Business Central

2023 Government

2023 Community Response

2023 Health Care & Life Sciences

2023 Business Intelligence

2022 D365 Finance & SCM

2022 Government

2021 D365 Field Service

2021 D365 Finance & SCM

### MORE

16 Microsoft Gold Competencies

Microsoft Inner Circle Partner



Business Applications

Data & AI (Azure)

Digital & App Innovation (Azure)

Infrastructure (Azure)

Modern Work

Security

Microsoft Cloud



# Advanced Specializations



  
Microsoft Solutions Partner

Security

**Specialist**  
Cloud Security  
Identity and Access Management  
Information Protection and Governance  
Threat Protection

  
Microsoft Solutions Partner

Modern Work

**Specialist**  
Adoption and Change Management  
Calling for Microsoft Teams Teamwork Deployment  
Modernize Endpoints

  
Microsoft Solutions Partner

Data & AI  
Azure

**Specialist**  
Analytics  
Infra and Database Migration  
Migrate Enterprise Applications to Microsoft Azure

  
Microsoft Solutions Partner

Business Applications

**Specialist**  
Small and Midsize Business Management  
Supply Chain  
Finance  
Sales

  
Microsoft Solutions Partner

Digital & App Innovation  
Azure

**Specialist**  
Migrate Enterprise Applications to Microsoft Azure

  
Microsoft Solutions Partner

Infrastructure  
Azure

**Specialist**  
Infra and Database Migration  
Azure Virtual Desktop



# Microsoft and Consulting an *In-Depth* Look

## Microsoft Solution Areas



### BUSINESS APPLICATIONS

- Dynamics 365
  - Operations
  - Sales
  - Customer Service
  - Field Service
  - Project Service
  - Marketing
  - Talent
- Dynamics CE
  - Dynamics NAV, GP, SL



### SECURITY

- Intune
  - Information Protection
  - Data Loss Prevention
  - eDiscovery
  - Communication Compliance
- Insider Risk Management
  - Azure Sentinel
  - Compliance Manager
  - Defender for
  - Endpoint
  - Cloud
  - Office



### INFRASTRUCTURE

- IaaS
- PaaS
- Managed Cloud Services
- Azure
- Stack
- DevOps



### DATA & AI

- Azure
  - Synapse Analytics
  - Machine Learning
  - Cognitive Services
  - Data Lake Analytics
  - Data Factory
  - Data Bricks
- Microsoft Purview
  - Power Platform
  - Power BI



### MODERN WORK

- Exchange
  - SharePoint
  - OneDrive
  - Power Apps
  - Power Automate
  - Power Virtual Agents
  - Teams
  - Licensing
- Viva
  - Managed Microsoft 365 Services



### DIGITAL & APP INNOVATION

- Advanced Power Platform
- Azure Integration Services
- Web Apps (Azure)
- Mobile Apps ( Xamarin)
- MC Commerce
- Advanced Power Apps



# RSM Industries Targeted for Microsoft Solutions

## Top Industry Focus

RSM has a deep bench of industry experts and has developed extensive IP to serve these clients.

- Manufacturing
- Consumer Goods: Food & Beverage
- Consumer Goods: Retail
- Healthcare

## Specialized Industry Expertise

RSM has developed solutions that extend Microsoft's native capabilities for these industries.

- State & Local Government
- Government Contractors
- Nonprofit
- Financial Services

# Cybersecurity Investment Team

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THANK YOU FOR  
YOUR TIME AND  
ATTENTION