

How to connect  
digital transformation  
to data optimization

# LEADING WITH DATA-DRIVEN DECISIONS

➤ **Just as every midmarket company is unique,** so is its technology transformation journey. But ultimately, digital transformation is about creating new opportunities for your business by leveraging technology to solve business challenges.



How can I understand my customer and operations better?



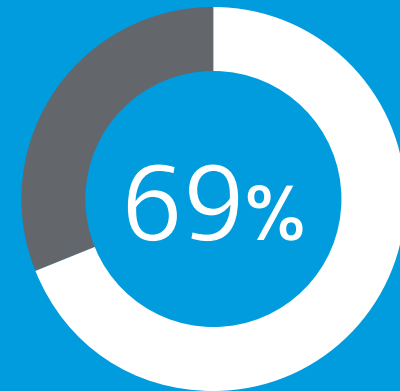
How can I remove waste from my operational processes and optimize them?



How do I increase my agility so I can change quickly based on market dynamics?



How do I drive innovation within our operations to gain market share without increasing my cost of operations?



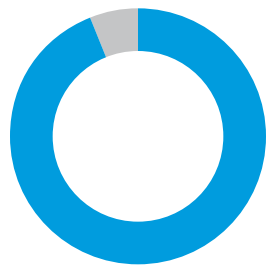
of corporate board members say digital transformation is very important to their company's success.

*The accidental customer:  
How legacy companies can become  
consumer-centric to win in the digital age*

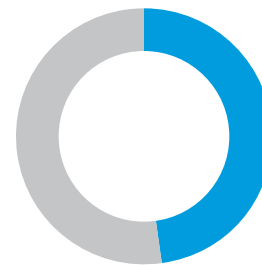
CONSIDER THE 3 PATHWAYS TO

# DATA OPTIMIZATION

Technology is an important component of leveraging data-driven decisions, but it isn't the only one. Organizations need strategies for data governance, maintenance, security and compliance. Underlying factors that could influence these strategies include organizational goals, risk tolerance, geographic location, industry regulations, tax laws and other inputs.



94%  
of companies report  
having a digital  
road map, but only...



48%  
say they have a fully  
developed digital  
strategy.

– RSM survey details middle market digital transformation strategies

➤ WHILE EVERY SITUATION IS DIFFERENT, THERE ARE 3 BASIC  
**PATHWAYS TO GET THERE**

1

**Do it on  
your own**

You select the vendors, plan the new process design and implementation, and then take on the responsibility for security, data migration, training, change management and long-term maintenance using your in-house resources.

2

**Do it with a  
vendor partner**

You use technology vendors to deploy your new applications and infrastructure and rely on them to build the new system and migrate your data. With this option, your partner knows one thing: the application they're installing.

3

**Do it with a third-  
party partner**

A consulting partner that's focused on outcomes can help you review your current processes and systems for gaps, select the best options from several solutions, and implement a long-term plan.

## PATHWAY #1

# > Do it on your own

You know your industry. You have an IT team. Shouldn't you be able to do this on your own?

### ASK YOURSELF THESE QUESTIONS FIRST:

- > Does our company have the bandwidth and skills needed to pursue this on its own?
  - > Will we be able to accomplish this quickly and without disruption?
- 
- > Are we fully aware of all the options available? You should be looking at SaaS vendors and emerging technologies such as artificial intelligence, blockchain and robotic process automation.



PATHWAY #2

# › Do it with a vendor partner

Why not choose an application vendor and let them handle the details?

**ASK THESE QUESTIONS BEFORE YOU COMMIT:**

- › Does the application vendor have deep experience with your industry and the solutions that will serve you best?
- › Can they support your team day to day over the long term?
- › Are they skilled at change management and training?



PATHWAY #3

# > Do it with a third-party partner

You may have found that the answers to many of the previous questions were either “No” or “Who knows?”

**LOOK FOR AN INDEPENDENT PARTNER WHO:**

- > Knows your industry and can offer industry-specific solutions
- > Provides managed services and other capabilities for a long-term relationship that supports the new model
- > Offers a comprehensive change management strategy that takes advantage of best practices to facilitate adoption
- > Offers other services and technologies, such as tax compliance and consulting, industry-specific assessments and supporting applications
- > Guides you in selecting the applications best suited for your organization and integrating them within your current technology
- > Provides the skills and knowledge necessary to implement the new solution





## CASE STUDY

# Lake Health Physician Group

A private, not-for-profit, Northeast Ohio-based physician network comprising of a wide range of specialties wanted to evaluate its provider-based billing methodology performance. RSM's dedicated healthcare industry professionals worked with LHPG to complete an initial assessment of its billing processes and revenue cycle.

The engagement was completed on time and key dashboards put in place to provide LHPG the following success metrics:

- › Incidental vendor findings resulting in savings of more than \$250,000
- › Decrease of \$1 million in held claims
- › Billing editor activated increasing staff efficiency (120 claims per day vs. 270 prior)
- › Reorganization of revenue integrity and posting

[DOWNLOAD FULL CASE STUDY](#)



“...we were skeptical. We thought there would not be many aha moments about our billing process. However, through the course of the assessment and engagement, we discovered our processes needed to be updated, our edits needed to be increased in the billing system, our claims could be automated and uniform billing claims could be released sooner.”

—CATHY JEFFERSON  
MBA, manager,  
Revenue Cycle Operations



# The RSM Difference

Our business technology consultants go well beyond implementing new software. We align people, process and technology for successful data optimization.

- › Support for multiple best-in-class business solutions: [Microsoft Dynamics 365](#), [Oracle NetSuite](#) and [Sage Intacct](#).
- › Complete implementation services to minimize disruption and drain on IT resources
- › Change management and training to ensure rapid time to value
- › Deep industry insight and experience in multiple verticals
- › Fully-integrated industry-specific solutions to maximize efficiency

Take the next step to leverage technology for data-driven decisions by investigating the technical consulting services RSM provides.

[READ MORE: RSM DATA ANALYTICS CONSULTING SERVICES](#)



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