



# RSM McGladrey, Inc.



## RSM McGladrey maximizes productivity and client satisfaction via remote support

RSM McGladrey, Inc., offers business and tax consulting, wealth management, retirement resources, payroll services and corporate finance to clients. The firm has more than 120 offices throughout the United States.

“With GoToAssist, we’re achieving higher employee retention, higher employee satisfaction and less burnout. Our people love GoToAssist.”

Steve Kleinwort  
Information Technology  
Manager  
RSM McGladrey, Inc.

### The challenge: increase billable hours while reducing travel time

How does a firm maximize billable consultant time while maintaining a superior level of client service? Steve Kleinwort, an information technology manager at RSM McGladrey, explained his firm’s dilemma: “We were traveling to client sites almost daily for software development, system integration or to resolve an issue.” As a result, the firm’s consultants were spending hours on the road rather than performing higher-value consulting work. “We needed a way to quickly resolve issues and reduce our travel,” Kleinwort said.

### Implementing GoToAssist for real-time remote support

Kleinwort recently discovered the right solution. Consultants and other professionals at RSM McGladrey now rely on Citrix® GoToAssist® each day to provide real-time remote support to clients. With proprietary screen-sharing technology and best practices support tools, consultants securely share a client’s server or desktop just as if the consultants were actually on site. “Instead of traveling, we can be consulting. It’s a much more effective use of our time,” said Kleinwort. “With GoToAssist, we help our clients faster and more efficiently. Everything about GoToAssist has exceeded our expectations.”

#### Key benefits

- Decreases call handling time by up to 75 percent
- Increases billable hours
- Boosts consultant and customer satisfaction

### Boost billable activities by providing efficient remote support

With a typical round trip to a client averaging two hours, travel costs add up rapidly. “Because we charge clients for travel time and mileage, using GoToAssist saves them money,” says Kleinwort. Issues that previously required hours of travel now can frequently be resolved in just minutes. “Most of our calls using GoToAssist are 15 minutes long — I can’t even walk to my car and get out of the parking lot in less than 15 minutes,” he said. With consultants traveling less, they can now spend their time on higher-value consulting services, thereby increasing their billable activities. “Because GoToAssist helps us resolve issues quicker, we can perform higher-billable-rate activities,” he said. “Our consultants are more efficient and are now earning more.”

## Exceed customer expectations with faster resolution

Not only are consultants more productive with GoToAssist, but clients are raving about the immediate support and service the firm now provides. "I can definitely say that we have higher client satisfaction with GoToAssist," said Kleinwort. The proof? "We receive glowing comments every day from our clients telling us GoToAssist is wonderful and is so much quicker than an on-site visit." Through higher client satisfaction, the firm expects to retain clients longer and secure additional business in the future.

Even issues that consultants handle over the phone have seen resolution times slashed since the debut of GoToAssist. "For issues that we were previously handling over the phone, we have cut the resolution time by as much as 75 percent," said Kleinwort. "Clients started demanding we use GoToAssist more often." In fact, GoToAssist has proved so popular with clients that the firm now charges extra for GoToAssist support sessions, thereby creating an additional source of revenue. "Clients were very accepting of the additional fee because we're helping them so much faster," he added.

## Improve job satisfaction by assisting from anywhere

Because consultants often need to be on call for emergencies, providing instant remote support via GoToAssist can often save the day — literally. "Some of our consultants have very specialized knowledge, and there is often only one person who can help a particular client," explained Kleinwort. A consultant can now assist clients in a pinch by working from home using GoToAssist. "In many cases we can resolve issues the same day rather than next day," he said. Through security features such as end-user permissions and 128-bit end-to-end AES encryption, GoToAssist helps reassure clients in sensitive industries that their data will remain confidential, even if the consultant is working from home. "Our tools must be secure to pass our firm's standards. GoToAssist is totally secure," said Kleinwort.

Because consultants are no longer traveling as much and can assist customers from almost anywhere, GoToAssist has provided some unexpected benefits. "I can honestly say that GoToAssist has greatly enhanced the quality of life of our consultants," said Kleinwort. "Our consultants want to be home for their children's ball games, and GoToAssist has allowed them to do that." The result is happier, more productive employees. "With GoToAssist, we're achieving higher employee retention, higher employee satisfaction and less burnout," he said. "Our people love GoToAssist."

### Product information:

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