

From manual close to global scale: Finance transformation in health care

RSM transforms health care leader's accounting operations with BlackLine

Our client is a global health care leader, specializing in surgical technology, with operations spanning North America; Europe, the Middle East and Africa (EMEA); Latin America (LATAM); and Asia Pacific (APAC). As the company scaled, their finance team faced mounting pressure to modernize their close process, reduce manual efforts and improve visibility across nearly 600 balance sheet accounts in the United States.

Despite a strong SAP® enterprise resource planning foundation, their reconciliation and journal entry processes were highly manual, inconsistent across regions and difficult to govern. These inefficiencies increased risk, delayed reporting and limited their finance team's ability to support strategic growth.

The challenge

The company's finance leaders recognized that their current processes couldn't scale with the business. Existing manual reconciliations and journal entries consumed valuable time and introduced risk. In addition, intercompany transactions were difficult to reconcile, and close tasks lacked centralization. Without a unified platform or automation strategy, the team struggled to gain real-time visibility or drive consistent execution across regions.

"Many large, global organizations tend to be very disparate when it comes to the way that they operate—especially in the finance and accounting world," says Jen Sanchez, RSM US LLP manager. "Our client saw some inefficiencies within their group and felt they needed to get everyone in one space to better align efforts across the organization."

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The solution: A strategic relationship with RSM and BlackLine

To strengthen their competitive position in the global health care landscape, the company selected RSM to lead the transformation and chose BlackLine as their finance automation platform.

RSM collaborated with the client to develop the transformation vision and plan for automating processes through BlackLine, defining deliverables and aligning the roadmap to the client's global footprint—but this was not a lift-and-shift initiative. Instead, the teams collectively reimaged workflows for scale and automation by redesigning journal templates, standardizing task dependencies and enhancing SAP master data to fully leverage BlackLine's capabilities.



Key elements of the approach included:

- **Cross-functional collaboration:** Held weekly check-ins and maintained open Q&A channels to maintain alignment and agility
- **Embedded change management:** Delivered ongoing training with peer-to-peer learning and quick reference guides
- **IT engagement:** Conducted collaborative design sessions to enable seamless SAP integration and long-term maintainability
- **Process redesign:** Optimized subprocesses, including intercompany reconciliations and automated journal entries, to drive early wins and build momentum

Outcomes: From manual effort to measurable impact

Within the first month of going live with the new processes and technology, the company saw tangible results that directly addressed its original pain points:

- **Efficiency gains:** 36,000 open item transactions were auto-cleared and 40% of journal entries were automated, freeing capacity and accelerating the close.
- **Improved control:** 55% of reconciliations were auto-certified and 94% of intercompany transactions were auto-matched, reducing risk and strengthening audit readiness.
- **Scalable enablement:** 2,600 reconciliation items were created and 350 close tasks were centralized—20% with dependencies—enabling better orchestration and oversight.

These outcomes were not driven by technology alone. They reflected a disciplined approach to governance, training and continuous improvement. The RSM team is helping the client establish an automation center of excellence (COE) to sustain momentum, promote best practices and identify new use cases across regions.

"The client's commitment and willingness to adapt their accounting processes was instrumental in the outcomes they realized," says Sanchez. "As they learned more about what was possible with BlackLine as a platform, they were all in to make sure they would achieve successful results, as we saw in month one. The numbers are continuously growing, speaking volumes to how dedicated they are to the finance transformation journey."



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Looking ahead: Global expansion of BlackLine and modular growth

With a strong foundation in place, the health care organization is working with RSM to continue the transformation in the APAC region and planning to expand its footprint across EMEA and LATAM in the coming year. The organization is also exploring additional expansion and automation opportunities, including financial analysis, additional data connectivity and artificial intelligence to further enhance visibility, automation and control.

The COE continues to play a central role, governing standards, supporting adoption and driving innovation across finance and IT.

"The relationship and the trust between RSM and the client is very strong," says Sanchez. "The constant communication and willingness of the client to communicate when they were uncertain about something really helped drive the project in a positive way."

Lessons for finance and IT leaders

The company's journey offers practical takeaways for organizations pursuing finance transformation:

- Focus on designing for scale, integration and automation rather than replicating legacy processes
- Engage IT early to align architecture and data strategy
- Phase deployments to support adoption and reduce disruption
- Establish champions and a COE to drive long-term value
- Treat change management as a continuous process, not a one-time event

By combining strategic vision with disciplined execution, the global leader in the health care industry and RSM demonstrated how finance transformation can deliver measurable impact—while laying the groundwork for global scale and continuous innovation.

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+1 800 274 3978
rsmus.com

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