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Vision



Our vision is to be the first-choice advisor to middle market leaders globally.

We chose every word of our vision statement carefully based on who we are today and who we want to become in the future. Let's take a look:

First choice – At RSM, we won't settle for being second best or fifth-largest. We want to be the very best firm providing audit, tax and consulting services for the middle-market businesses we choose to serve. But rather than defining our vision as "the best firm," we defined it as "the first choice," which is client-centered. When our current and prospective clients consistently choose RSM first because we offer better service, better insights and better value, we will have achieved our vision.

Advisors – The concept of being an advisor is crucial to our service delivery model here at RSM. We will differentiate ourselves not just by providing quality audit, tax and consulting services, but also by providing something more for our clients. The middle-market businesses we work with require a higher level of general business advice and insights about the regulatory environment, the overall business climate and the industries in which they operate. Regardless of your position, our clients also want to work with people who are caring, curious, collaborative, courageous, critical thinkers. That's what being an advisor is all about, and it's what will ultimately make RSM the first choice of the middle market. Being viewed and acting as an advisor should never conflict with our ability to provide independent and objective audits.

Middle market – We have clearly defined the target market we want to serve here at RSM. We win when we differentiate ourselves in this market through our integrated services, accessible approach and insights. We will actively seek to retain, expand and build new relationships in the middle market while maintaining the flexibility to serve the smaller and larger ends of the market where we have the capabilities and capacity to do so.

Leaders – Working directly with the owners, boards of directors, management teams, fund managers and other leaders of the middle-market businesses we serve makes RSM an exciting place to be. Each day, our goal is to deliver excellent service and valuable insights that will ultimately help these leaders to meet their professional services needs and improve their businesses. As we do this, we begin to build long-term

relationships with these business leaders, and they seek us out as their first choice for audit, tax and consulting services.

Globally – As the largest firm in the leading global network for the middle market, we must think globally, serve global clients and help companies understand the impact global events may have on their business. We must also collaborate with firms around the world and participate in activities of the network to understand what others are doing and share what we are doing.

By working together and staying true to our purpose, strategy and values, RSM will achieve this vision.

Middle market leaders seek us out because of these attributes, which are unique to our brand and culture:

- Are sought out for our caring, inclusive culture and inspired relationships
- Are renowned for our industry insights, technical expertise and middle market perspective
- Provide strong and diverse talent opportunities to accomplish their career aspirations and impact the community
- Serve our clients through integrated and collaborative teams that enable confident decisions
- Innovate to address changing markets and develop services to stay ahead of our clients' evolving needs
- Are consulted by influencers, policymakers, industry leaders and alumni who want insights on the middle market
- Are the premier firm serving the middle market around the world

To achieve our vision, we must maintain momentum on these 11 principles:

1. Develop our people to differentiate based on our [caring relationships](#), [critical thinking](#), [advisory skills](#) and continue “to be easy to work with”
2. Use [industry knowledge](#) as the catalyst to deliver foundationally strong technical quality, integrated solutions, and new ideas and insights
3. Drive enhanced collaboration across all facets of the firm
4. Take multiple and disparate pieces of information (data) and bring it to clients and the marketplace in a novel way to solve problems or take advantage of opportunities
5. Engage and continuously [develop our people](#) to support personal and professional success and ensure they are equipped to serve diverse clients in a changing environment
6. Position our teams of the future to fulfill our [brand promise](#) and be effective in a changing environment
7. Achieve balance between metrics and behaviors aligned with our [values](#) and [strategy](#) to drive RSM's long-term success
8. Provide leading technology platforms that enable our people to serve our clients and participate in [innovation](#)

9. Have a leadership position in an impactful [global network](#) to be accessible to clients everywhere in the world they do business
10. Be deliberate about cultivating [RSM promoters](#) – COIs, alumni, strategic partners and other influencers
11. Seize opportunities to maximize growth and invest in high gain areas

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