

# RSG Engagement Platform

## OVERVIEW

In the fall of 2025, RSG released its new client and advisor portal. Developed internally by the RSG team, the portal and integrated tools provide clients with a seamless experience and incredible visibility into each step of their engagement as they work closely with their advisors.

## FEATURES & FUNTIONALITY

### Designed for Each Engagement Phase

- ❖ **Onboarding** - Seamless onboarding page with access to online questionnaires, dedicated (and secure) document share site, and access to Zoho's messaging and collaboration tool (similar to Slack)
- ❖ **Diagnosis** – Series of forms to identify potential initiatives, lay out KPIs and OKRs, SWOT Analysis, Issues identification and key man risk considerations, etc. – all visible in a powerful analytics dashboard.
- ❖ **Planning & Implementation** – Incredible tool for creating, editing and tracking detailed project plan with full accountability through assigned ownership and due dates. Summary views available via our analytics dashboard.
- ❖ **Actuals vs. Estimates**– Update identified engagement initiatives with actuals to track performance against pre-implementation projections. Then use the analytics dashboard to visualize initiative performance.

### The Power of Zoho One

- ❖ **Zoho Creator** – Developer tool used by RSG to design our specialized pages with forms, templates and relevant access links.
- ❖ **Zoho Analytics** – Powerful dashboard to visualize and summarize important information during each phase of your engagement.
- ❖ **Zoho Project** – Incredible project management tool to create, edit and track implementation of various deliverables, ensuring accountability by owner and timeline.
- ❖ **Zoho Workdrive** – hare drive with dedicated space, by client user.
- ❖ **Zoho Cliq** – A real-time messaging and collaboration platform to leverage throughout the full lifecycle of your engagement (similar to “Slack”).