



## CASE STUDY

Coleman Research Uses Armanino Applications to Help Employees Safely and Efficiently Return to the Office

### Customer Profile

Coleman Research Group is a leading expert network founded in 2003 by Kevin Coleman. For nearly 20 years, the Coleman team has been trusted by the world's largest asset management funds, management consultancies and corporations for rapid insights from hard-to-find experts. Coleman's network includes over 260,000 registered experts in 190 countries. Coleman is known for the highest standards of excellence, with dedicated client teams, 24/7 global support, proprietary technology and rigorous compliance protocols. Its offices around the world are based in the U.S., EMEA (Europe, Middle East and Africa) and APAC (Asia Pacific) regions. Following a pivot to remote work at the start of the pandemic, Coleman prepared to shift to a hybrid work model as offices planned to reopen. The company turned to Armanino's Return to Work and Workplace Scheduler apps to help it make the office safe and convenient for those employees who want to return to an office environment.

### Benefits

Delivers a single back-to-office solution that is easy to administer and works across all global locations

Gives employees the confidence and security they need to safely and effectively spend time working in newly re-opened offices

Provides usage data for future capacity planning for hot-desk environments

### Services



Return to Work App



Workplace Scheduler App

### Challenge

Coleman Research Group is a pioneer in the expert network services (ENS) industry with over 260,000 experts and offices across the globe, including New York, London, Hong Kong, Los Angeles and Raleigh, North Carolina. Since its founding in 2003, Coleman has been trusted by the world's largest asset management funds, management consultancies and corporations. Coleman is one of the leading players in the highly competitive ENS market, growing more than 50% in 2021. They provide clients with rapid insights (expert matches often in less than one hour), a rigorous compliance framework and high matching efficiency.

The 2020 global coronavirus pandemic forced Coleman's team to pivot to a remote workforce. Coleman's established technology infrastructure is largely cloud-based and helped enable the transition for their 240+ employees (as well as their extensive network of experts) to work from home.

Decisions about when and how to reopen offices took into consideration the shifting nature of the virus and people's evolving attitudes toward in-office work. "Throughout the pandemic we've been communicating openly with our employees and surveying them about their preferences for post-pandemic work," says Helen Materazzi, chief people officer for Coleman. "From their responses, it quickly became clear that we needed to make returning to the office voluntary."

As a result, Coleman is changing the way their teams work and recently announced their new FlexSpace work model. They recognize the recent shift in work-life and are taking the opportunity to attract diverse talent from a broader range of locations. Their hybrid work model offers employees a workspace wherever and however they work best.

Whether it's working at one of Coleman's dedicated offices in major urban hubs, one of 800+ WeWork locations globally or from home, they want their employees to feel that their workspace is flexible. Coleman needed to find and adopt a technology solution that would support this new way of working and help make it happen.

As executive sponsor of a cross-functional team involved with the transition to a hybrid work model, Materazzi researched user-friendly tools that would enable two core capabilities: 1) a wellness questionnaire to make sure employees meet health criteria to safely return to an office environment; and 2) a hot-desk reservation system, giving employees the flexibility to reserve a workspace at one of Coleman's offices around the world.

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Helen Materazzi, Chief People Officer, Coleman Research Group

## Solution

While Armanino's Return to Work and Workplace Scheduler applications met all of Coleman's requirements, it was Armanino's solution-oriented approach and willingness to listen that really made its solution stand out as the best choice for the company. "Instead of just selling us a product, Armanino collaborated with us to understand what we needed and helped us achieve that," says Materazzi.

To make it as easy and convenient as possible for Coleman employees to use the Return to Work (known as the Wellness Questionnaire app at Coleman) and Workplace Scheduler apps, they've been integrated into Coleman's existing environment atop its Microsoft Teams platform. Dylan Bernier, IT support engineer for Coleman, posted user guides and demos on the company's intranet, while Gina Huffman, HRIS and benefits manager at Coleman, used internal communications to encourage the use of the apps for those employees who wanted to return to the workplace.

While office re-openings have been slower than anticipated due to the vagaries of the pandemic, the sites that have reopened — for example, London and Raleigh — are using the apps to support the new hybrid work model. "As more employees choose to make use of our office space, we'll be able to use the apps' reporting functions to help us understand how many desks and workstations we need to provide," says Materazzi. "The tools also help us conduct contact tracing, when needed."

## Results

With more than 50 of Coleman's employees using the Armanino apps at least intermittently, Materazzi and her colleagues are already pleased with the results. "The solution meets our needs without any heavy administration on our part," says Materazzi. "Beyond that, we're very pleased to have a single solution that works across all our global locations."

According to Huffman, employees are also seeing the benefits of using the Return to Work and Workplace Scheduler apps. "Our workers appreciate that we've deployed the Armanino apps," she says. "They feel more secure and comfortable going back into the office knowing that we're tracking wellness and capacity. What's more, the apps are easy to use and can be accessed from their cell phones."

Adds Bernier, "The apps have become even more user friendly since we first rolled them out. Keeping things simple and easy for everyone is key, and these apps are succeeding at that."

## WHAT THEY'RE SAYING

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## Next Steps

As the company moves forward, Materazzi believes that having such tools will be important to attracting the top talent to support Coleman’s rapid growth worldwide. “In our changed work landscape, the need for the Wellness Questionnaire (Return to Work) and Workplace Scheduler apps will not go away,” she says. “We look forward to what our collaboration with Armanino will bring as they share best practices learned from other clients, and we learn more ways these tools can help us effectively manage our hybrid work model.”

## About Armanino<sup>LLP</sup>

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it’s financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we’ll consult with your people about workflow efficiencies. If it’s compliance, we’ll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company’s lifecycle, we’ll help you find the right balance of people, processes, and technology.

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