

THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING



Joze

One of the
RSM team



RSM in Kuwait Technology Hub

September 2025

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Integrated Technology Solutions for Evolving Business Needs

At RSM in Kuwait, our approach is to embed technology directly into our service delivery framework. Our proprietary digital platforms are developed in-house to streamline complex processes, enhance collaboration and provide clients with greater visibility.

These tools are designed by our professionals to address the specific operational, compliance and regulatory challenges of the Kuwaiti business environment, enhancing practical application with tangible results.

Transforming Service Delivery with Innovative Technology

Building Trust and Service Excellence with Digital Tools



Enhancing Service Delivery

AI-powered automation streamlines workflows, reducing turnaround times while enhancing quality.



Strengthening Visibility

Real-time tracking and status updates provide clients with full visibility into engagement progress.



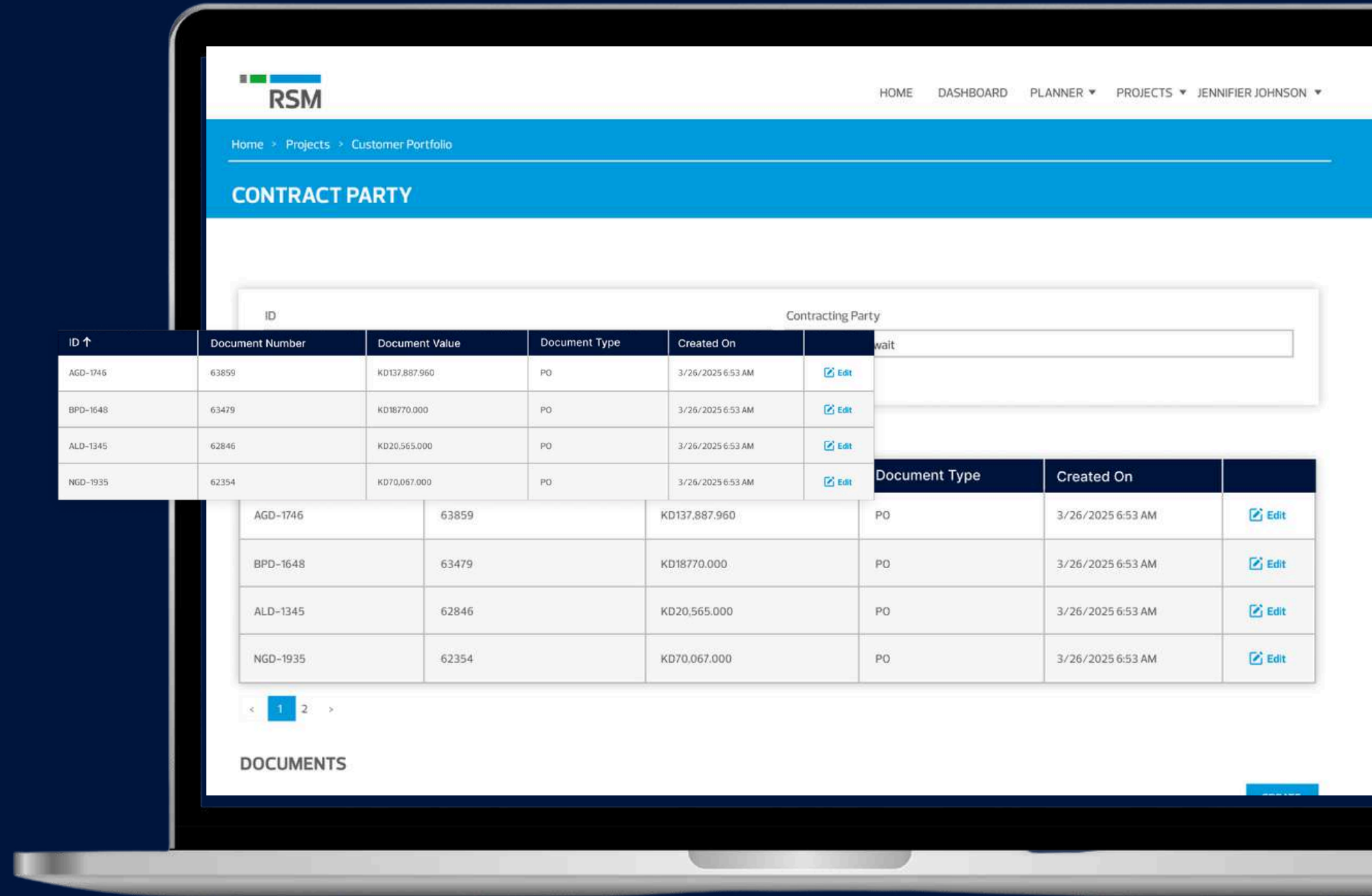
Closing Compliance Gaps

Built-in checks and automated processes help maintain regulatory adherence while improving compliance.



Analytics

Advanced analytics highlight trends, Risk compliance, recalculation and provide enhanced audit result that traditional approaches may overlook.



Integrated Platforms for Better Service Delivery

Our integrated platforms are designed to support the entire client engagement lifecycle—from opportunity management to final report issuance. By connecting workflows, automating routine tasks, and embedding compliance, our ecosystem reduces manual steps, improves accuracy and accountability at every stage.

- 

Aligned with Compliance – Built-in controls helps with adherence to relevant standard and regulatory requirements.
- 

Developed by Experts – Designed and maintained by professionals with deep technical and industry knowledge.
- 

Focused on Usability & Security – Seamless integration, simple interfaces, and robust data protection.
- 

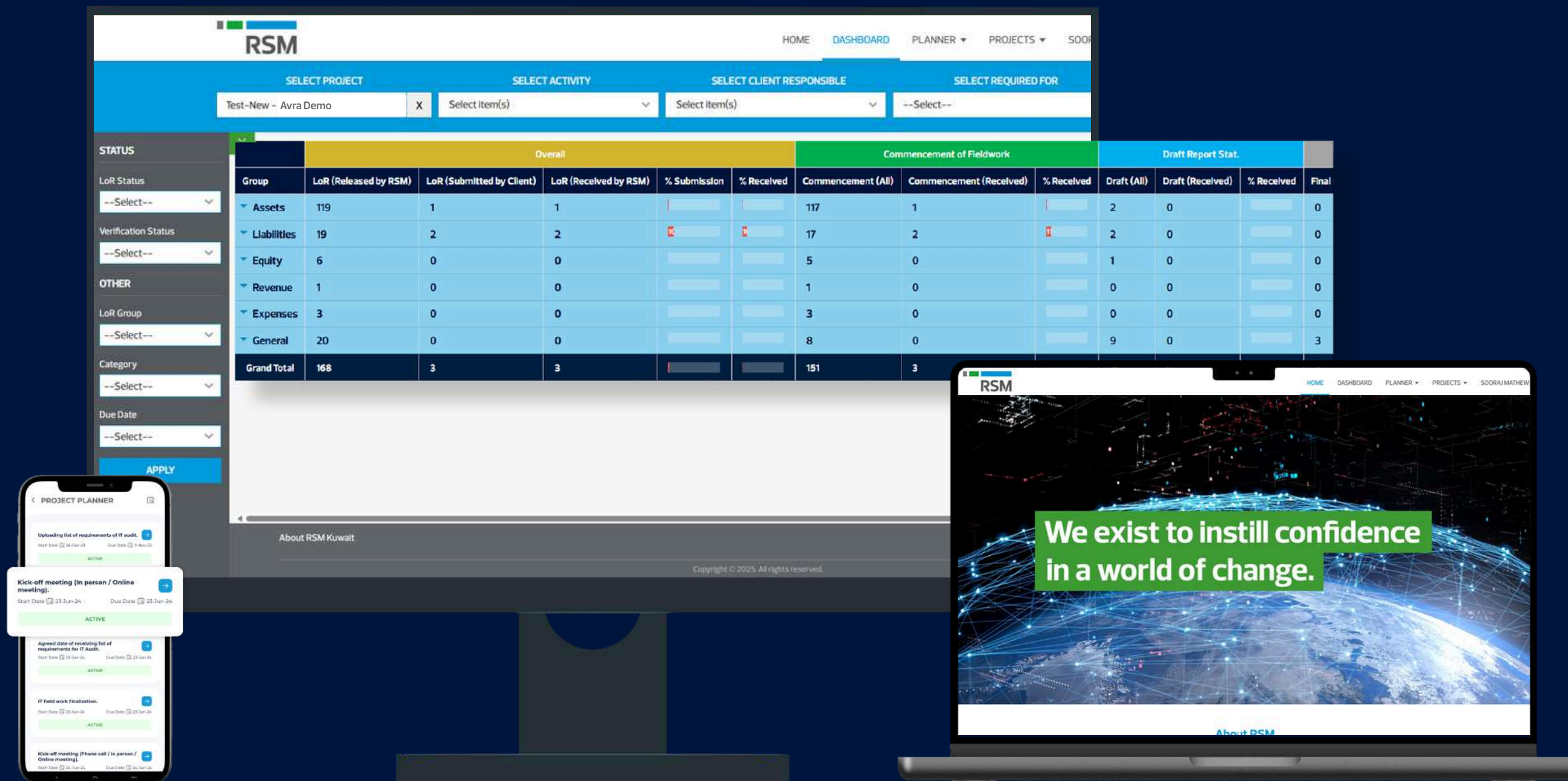
Practical & Supported – Fully backed by our professional teams for real-world effectiveness.



Our Technology Ecosystem

Proprietary Platform Ecosystem

At RSM in Kuwait, technology is not a separate service—it is the integral foundation upon which we build our assurance, tax and consulting engagements. Our philosophy is that by intelligently automating processes, we empower our experts to focus on what matters most: delivering strategic insights and exceptional value to our clients.



The desktop monitor displays the RSM dashboard with the following table:

Group	Overall					Commencement of Fieldwork			Draft Report Stat.			Final
	LoR (Released by RSM)	LoR (Submitted by Client)	LoR (Received by RSM)	% Submission	% Received	Commencement (All)	Commencement (Received)	% Received	Draft (All)	Draft (Received)	% Received	
Assets	119	1	1			117	1		2	0		0
Liabilities	19	2	2			17	2		2	0		0
Equity	6	0	0			5	0		1	0		0
Revenue	1	0	0			1	0		0	0		0
Expenses	3	0	0			3	0		0	0		0
General	20	0	0			8	0		9	0		3
Grand Total	168	3	3			151	3					

The smartphone displays the 'PROJECT PLANNER' with the following items:

- Uploading list of requirements of IT audit. Start Date: 16 Dec 23, Due Date: 19 Dec 23. ACTIVE
- Kick-off meeting (In person / Online meeting). Start Date: 23 Jun 24, Due Date: 23 Jun 24. ACTIVE
- Agreed date of receiving list of requirements for IT Audit. Start Date: 20 Jun 24, Due Date: 20 Jun 24. ACTIVE
- IT Field work Finalization. Start Date: 20 Jun 24, Due Date: 20 Jun 24. ACTIVE
- Kick-off meeting (Phone call / In person / Online meeting). Start Date: 20 Jun 24, Due Date: 20 Jun 24. ACTIVE

The laptop displays the RSM website with the text: "We exist to instill confidence in a world of change."

Sample of our Technology Ecosystem: A Functional Overview

At RSM in Kuwait, our digital ecosystem brings together four pillars – client engagement, operations, process automation and risk analytics. Each tool is purpose-built to support compliance, streamline workflows and improve collaboration. By connecting these platforms, we create a unified environment where tasks are automated, reviews are traceable and compliance with ISQM 1 and other relevant requirements is embedded across every stage of delivery.

Client Engagement & Collaboration

- **Avra** – A Microsoft Dynamics 365–based hub for real-time status updates, document exchange, and client communication.
- **Voice of Client (VoC)** – CRM-integrated feedback system that triggers milestone surveys, escalates concerns, and tracks resolution.
- **TaxFlo** – Uses OCR and NLP for data extraction, automated tax calculations, and centralised submission tracking.
- **Confirmation Tool** – Automates requests, tracks responses, and validates data across multiple banks.
- **Control Self-Assessment Portal**– This tool streamlines drafting, review, and issuance of management letters, providing consistency and quality. It enhances audit coordination and clarity through centralised access and seamless integration.

Internal Operations & Resource Management

- **Opportunity Management** – Power Apps–based intake and approval system with conflict checks and compliance workflows.
- **Resource Planning** – Drag-and-drop scheduling hub with skills-based allocation, integrated time logging, and budgeting system.
- **Dispatching & Pickup** – Digital delivery management with e-signatures, proof of delivery, and real-time notifications.
- **E-Signature & Document Processing** – Auditable systems for electronic signatures, document review, and approval workflows.
- **Training Management** – CRM-integrated module to automate course administration, track progress, and support continuous professional development.
- **KPI Management Tool** – CRM-based system that automates employee performance tracking, aligning efforts with organisational goals.
- **Audit Caption Tracker**– CRM-integrated module that streamlines audit engagement management, tracking progress from preparation to approval.

Data Analytics & Risk Assessment

- **The Magnifier** – ERP-integrated analytics engine for full-population testing. Identifies anomalies, flags control gaps, and presents findings through interactive dashboards.

Core Process Automation

- **Client Report Issuance (CRI)** – Cloud-based workflow for report reviews, approvals, and version-controlled audit trails.

Core Technology Platforms



Avra: Revolutionizing Client Engagement

A cutting-edge platform that integrates with Microsoft Dynamics 365, transforming client engagement for modern businesses. Collaboration, real-time insights and AI-powered automation enhance efficiency, visibility and accountability in one digital hub.



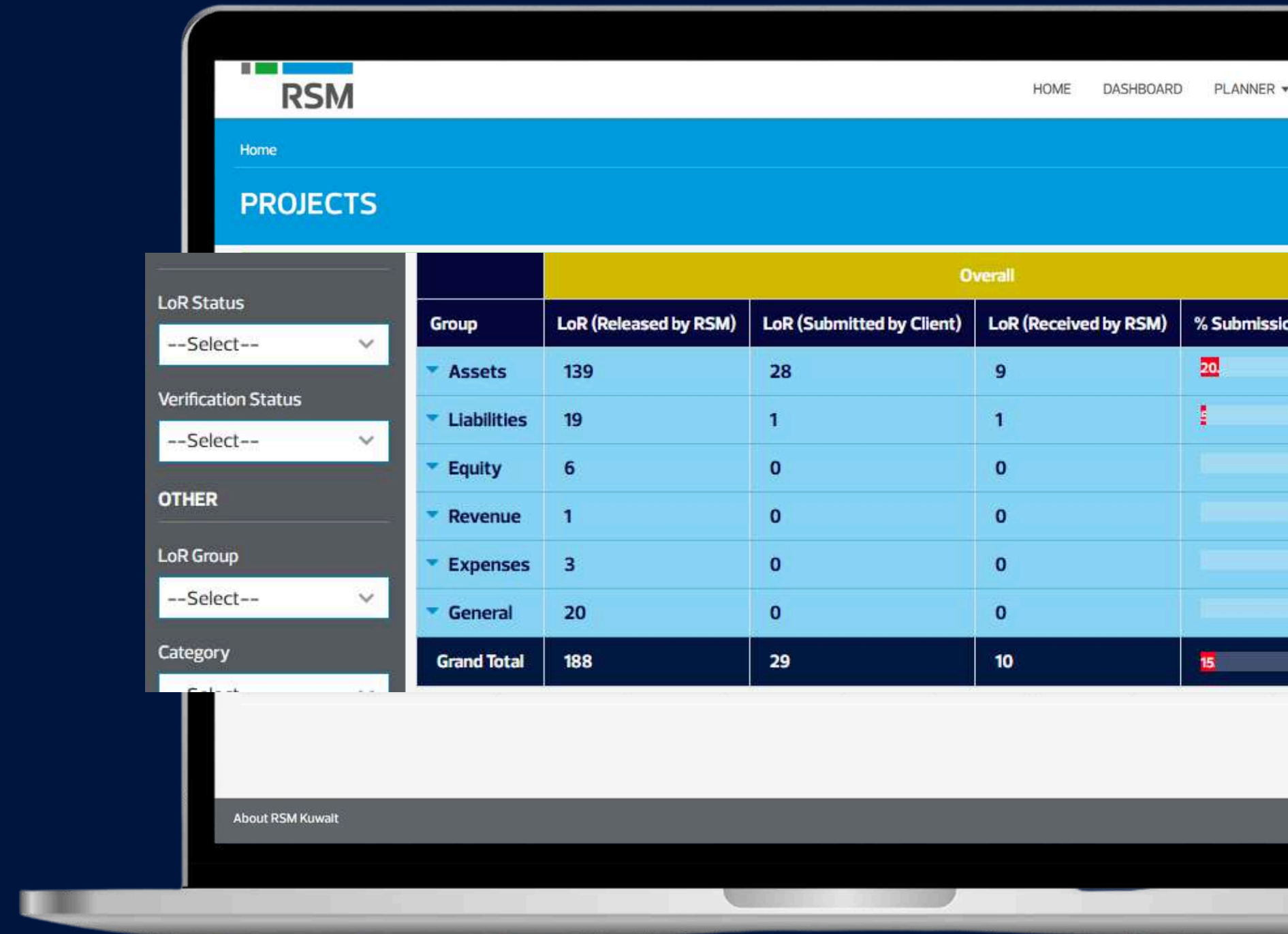
AI-Powered Automation
Enhances productivity with intelligent workflows.



Intelligent Document Review
AI-driven approval processes to increase compatibility.



Automated LoR Generation
Creates a structured list of requirements.





[VIDEO](#)



[FACTSHEET](#)

The Magnifier: Data-Analytics Platform

An analytics engine that ingests ERP data and applies risk-focused analysis to highlight anomalies and trends for engagement teams.



Full-Population Analysis

Reviews all transactions to identify unusual activity.



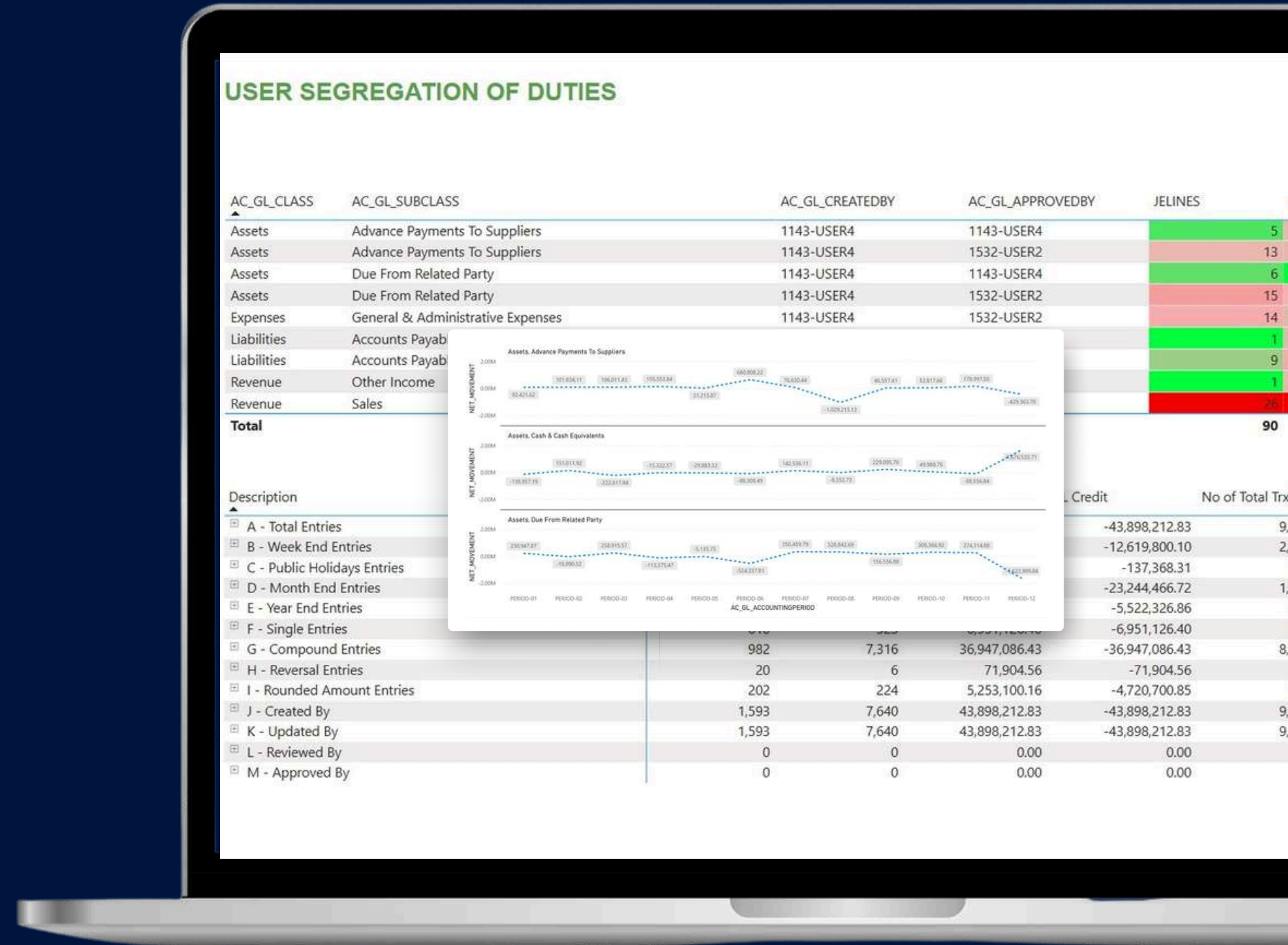
Targeted Risk Testing

Applies audit logic to flag potential control gaps.



Interactive Dashboards

Presents trends and risks through clear visual summaries.





Voice of Client (VoC) Platform

A feedback engine that distributes milestone-triggered surveys and tracks responses inside the CRM environment.



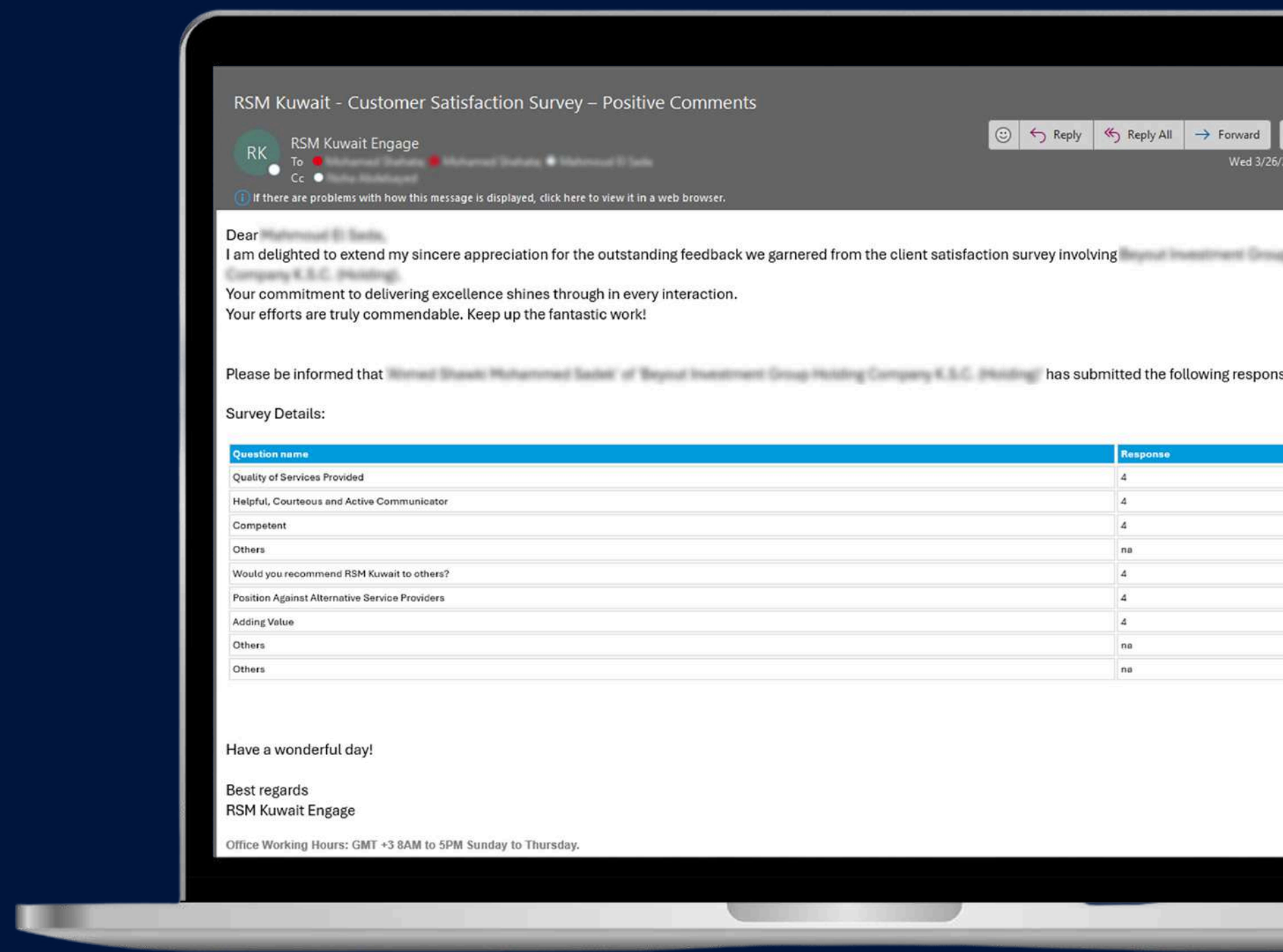
Triggered Client Surveys
Collects feedback at key service milestones.



Case Escalation Workflow
Routes issues to teams for follow-up and tracking.



Client Sign-Off Option
Lets clients confirm when concerns are addressed.





[VIDEO](#)



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TaxFlo

A portal that combines OCR, NLP and machine-learning techniques with RSM in Kuwait tax know-how to simplify document review and calculation steps in Kuwait tax returns.



AI-Based Document Reading

Extracts key communication/ inspection data from scanned and digital files.



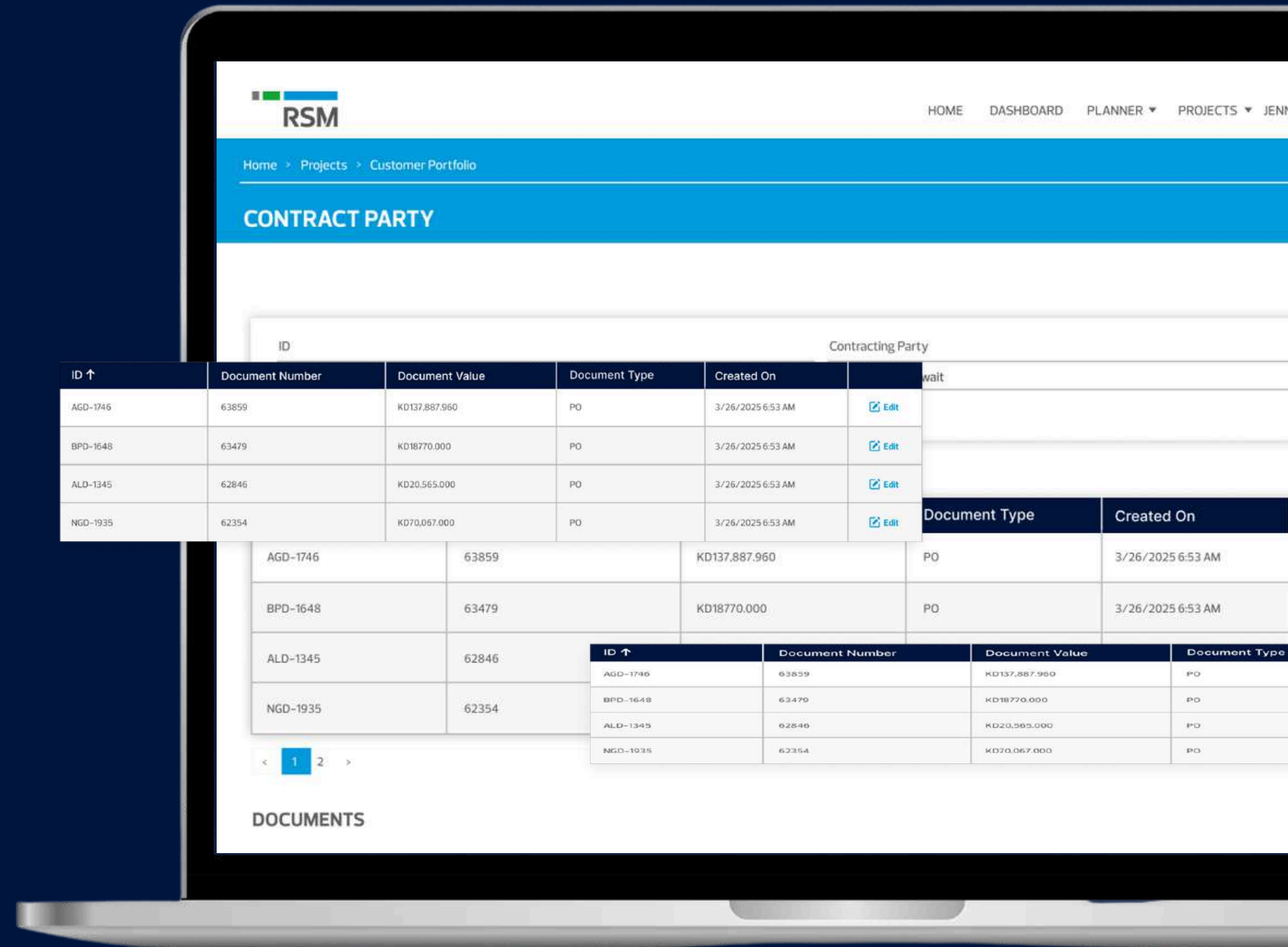
Automated Tax Calculation

Applies rates and rules to produce draft tax returns



Centralised Submission Portal

Manages uploads, approvals and submission tracking.





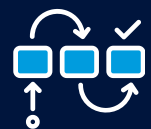
VIDEO



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Client Report Issuance (CRI) System

A cloud-based workflow that digitises report routing, multi-level reviews and document versioning, so reporting teams can work more transparently and with fewer manual hand-offs.



Automated Workflow Routing

Routes reports through defined review steps with email alerts.



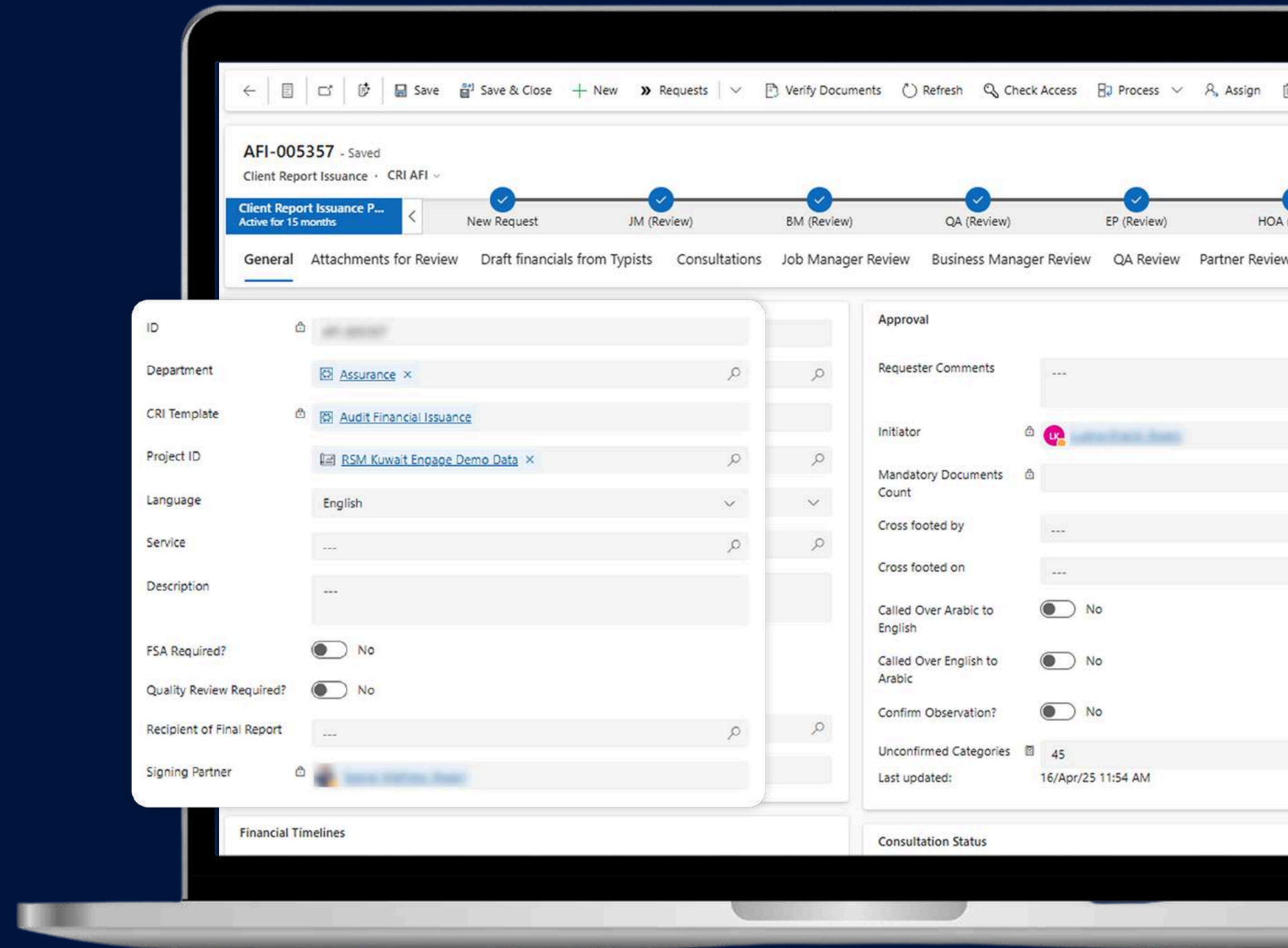
Real-Time Transparency

Shows live status of approvals and pending actions.



Version-Controlled Repository & Quality Review

Stores all report versions with edit history, access logs, and tracks quality review status for improved accountability.





VIDEO



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Confirmation Portal

A three-phase workflow that streamlines confirmation requests, follows up with banks and stores responses centrally.



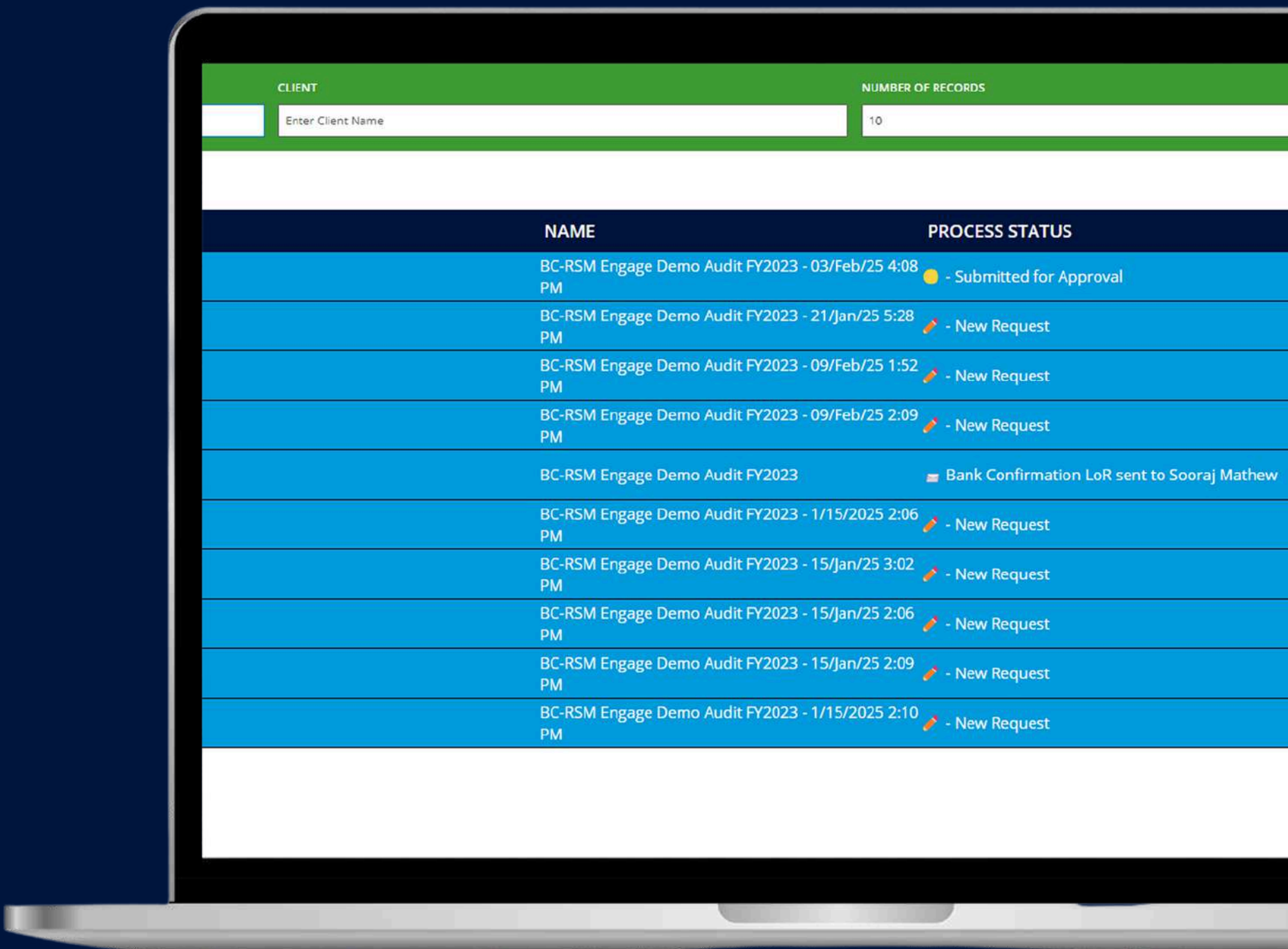
Automated Request Distribution
Sends and tracks confirmations across banks.



Data Validation Features
Flags inconsistencies before final submission.



Collaborative Access
Allows real-time input from clients and auditors.





[VIDEO](#)



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Opportunity Management

Opportunity Management solution, built on Microsoft Power Apps, offers a centralised and consistent framework to manage client opportunities—from initial intake through to risk assessment and internal approvals. This platform empowers teams to act decisively while maintaining compliance, transparency, and strategic alignment.



Smart Intake Forms

Captures opportunity data with built-in conflict checks.



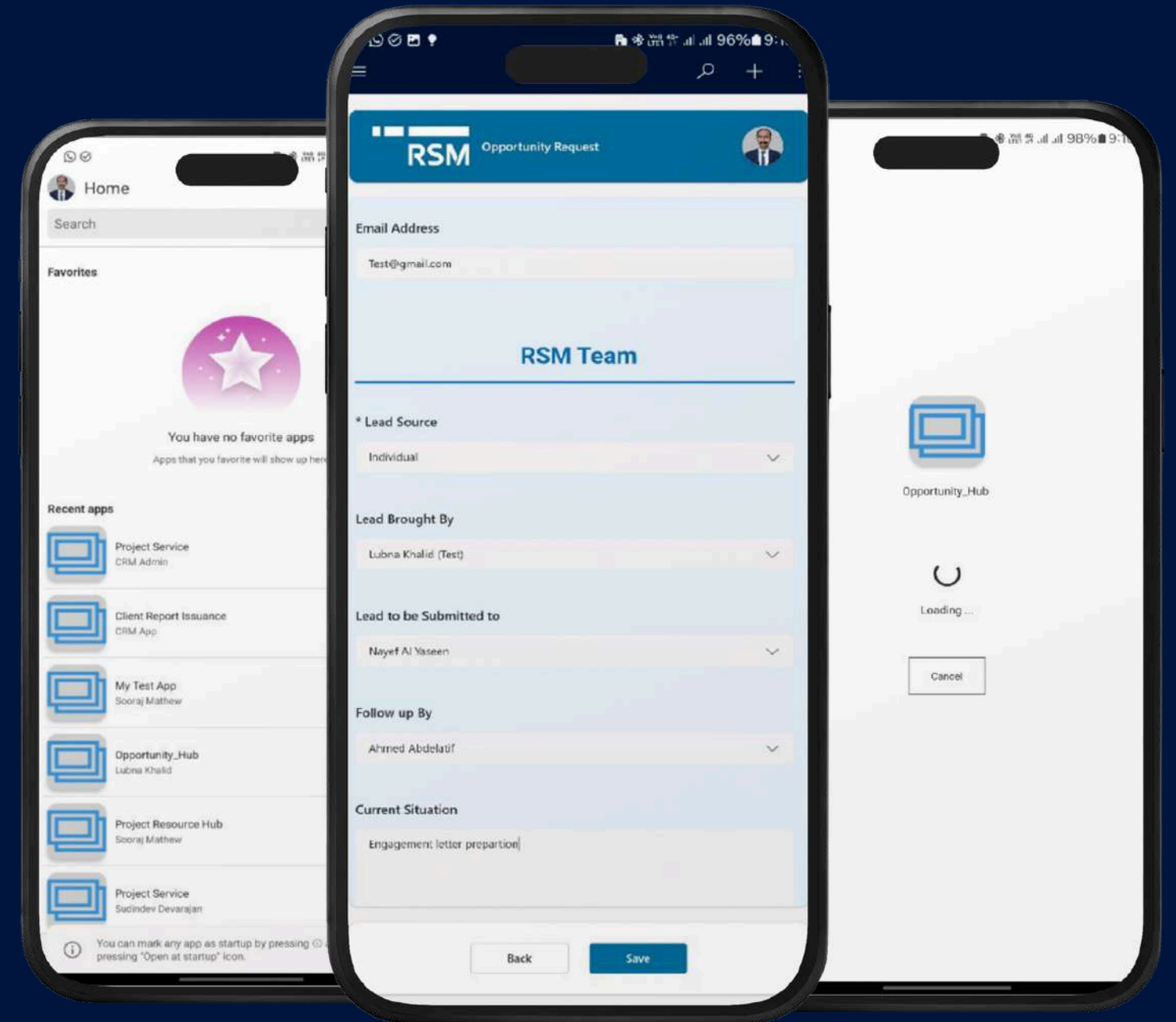
Structured Approval Paths

Automates sign-off



Live Pipeline Reporting

Tracks opportunities





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Resource Planning Management

A drag-and-drop scheduling hub that connects staffing plans, capacity data and budgeting information in one place. Allocation Through Technology for Enhanced Client Service



Skill-Based Scheduling

Matches staff with jobs based on availability and level.



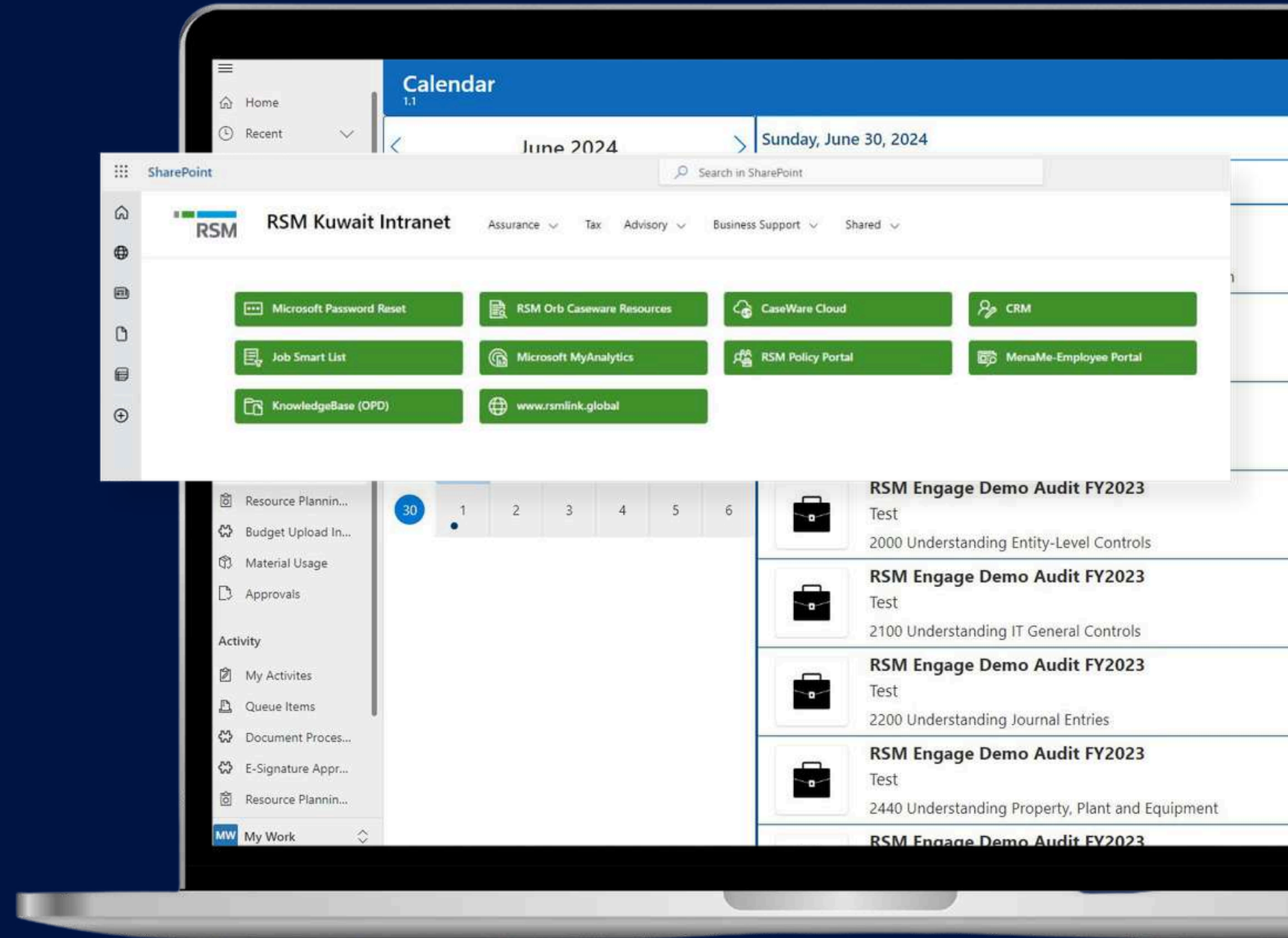
Integrated Time Logging

Converts planned time into draft timesheet entries.



Utilisation Reports

Provides weekly metrics on hours and project loads.





Training Management Module

A CRM-integrated module that automates course administration and tracks progress for employees and clients.



Course Lifecycle Automation

Handles registration, reminders and certifications.



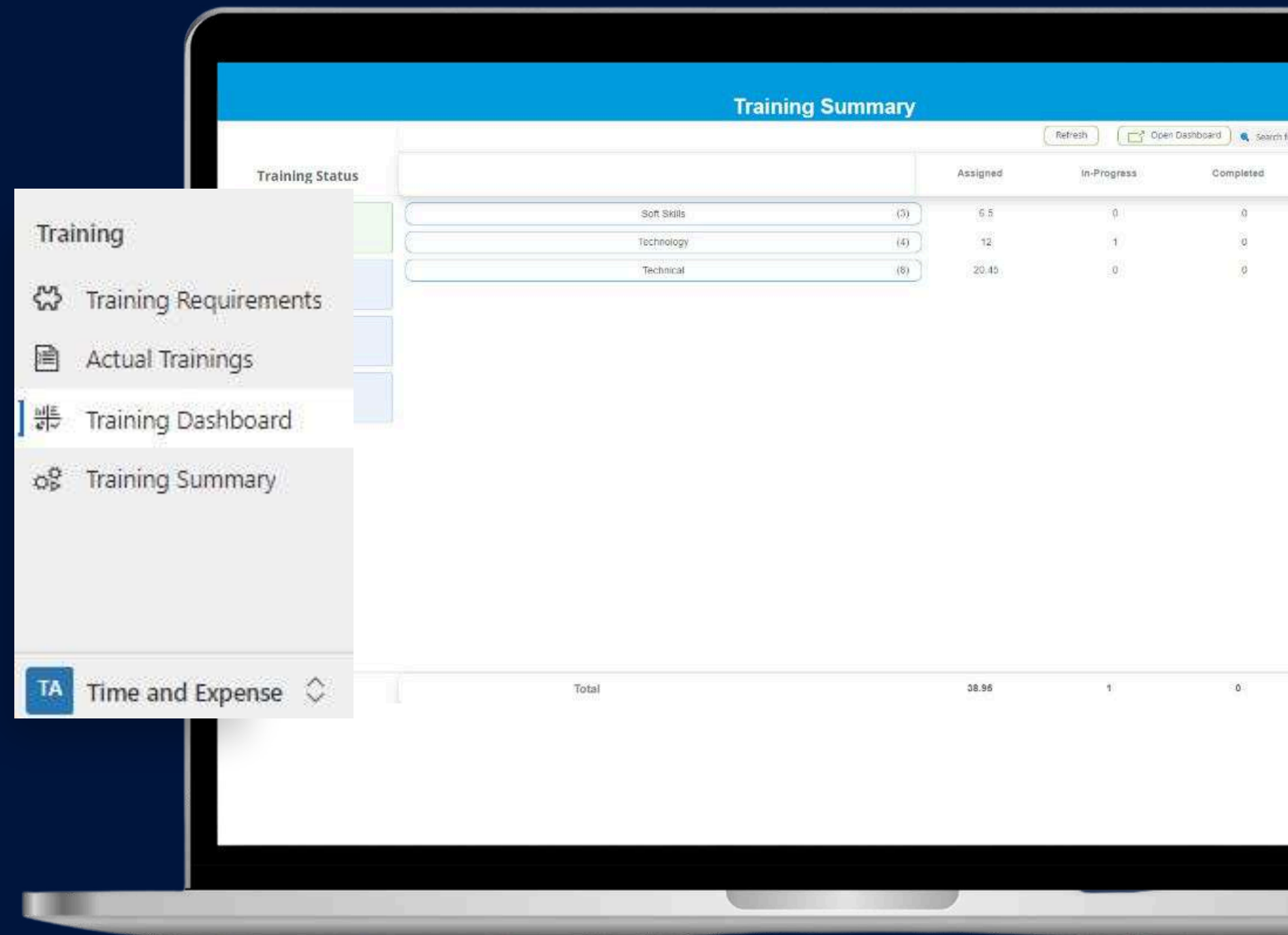
Progress Monitoring Dashboards

Shows training status by course and department.



Insights for HR Planning

Identifies learning gaps and participation trends.





[VIDEO](#)



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Dispatching & Pickup — Enterprise Delivery Management

A Tookan-powered solution that replaces paper logs with digital task assignment, mobile signatures and status alerts.



Digital Task Assignment

Schedules pickups and deliveries using mobile apps.



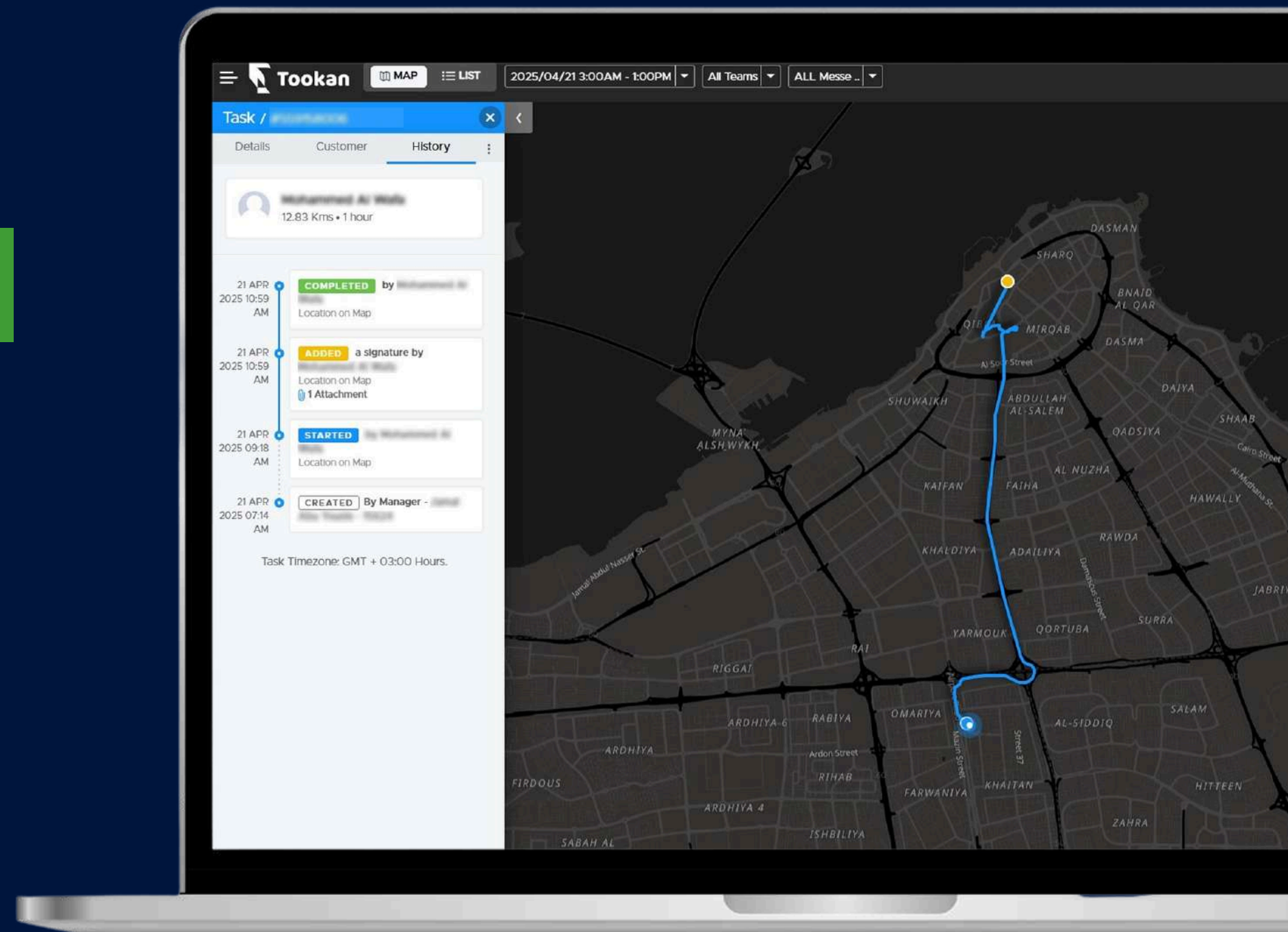
Proof of Delivery Logging

Captures e-signatures and timestamps from messengers.



Status Notifications

Sends real-time updates by SMS or email.





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Reissuance of Financial Statements

CRM-integrated workflow that manages updates to previously issued statements with full oversight.



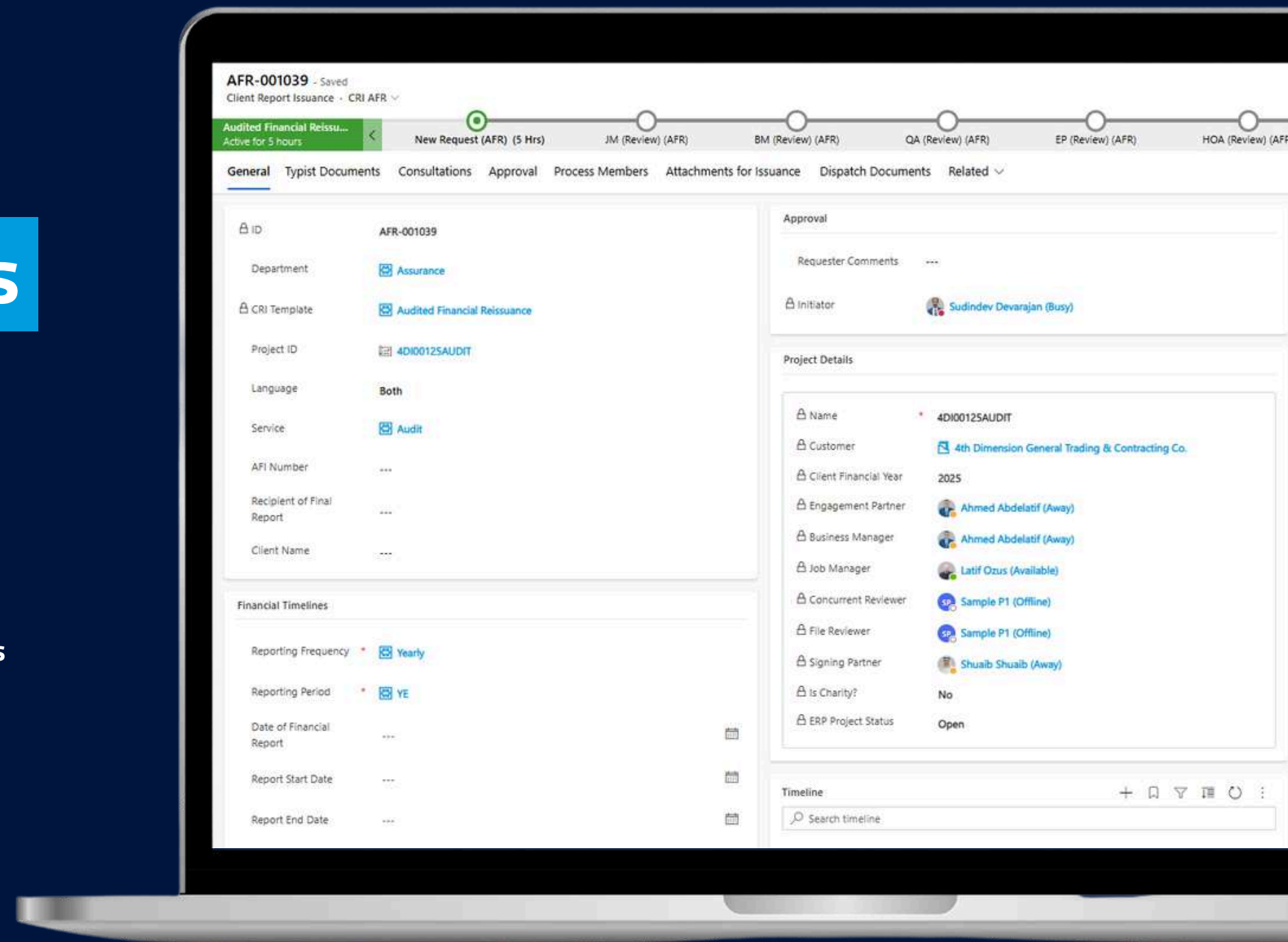
Before/after upload with change summary
and audit-ready version history.



Sequential, role-based review & QA consultation
captured in a permanent approval trail.



Tracked tasks, auto-notifications & dispatch connectivity
helps with timely completion and proper stakeholder hand-off.





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E-Signature

CRM-embedded module for controlled execution of electronic signatures on internal and client deliverables.



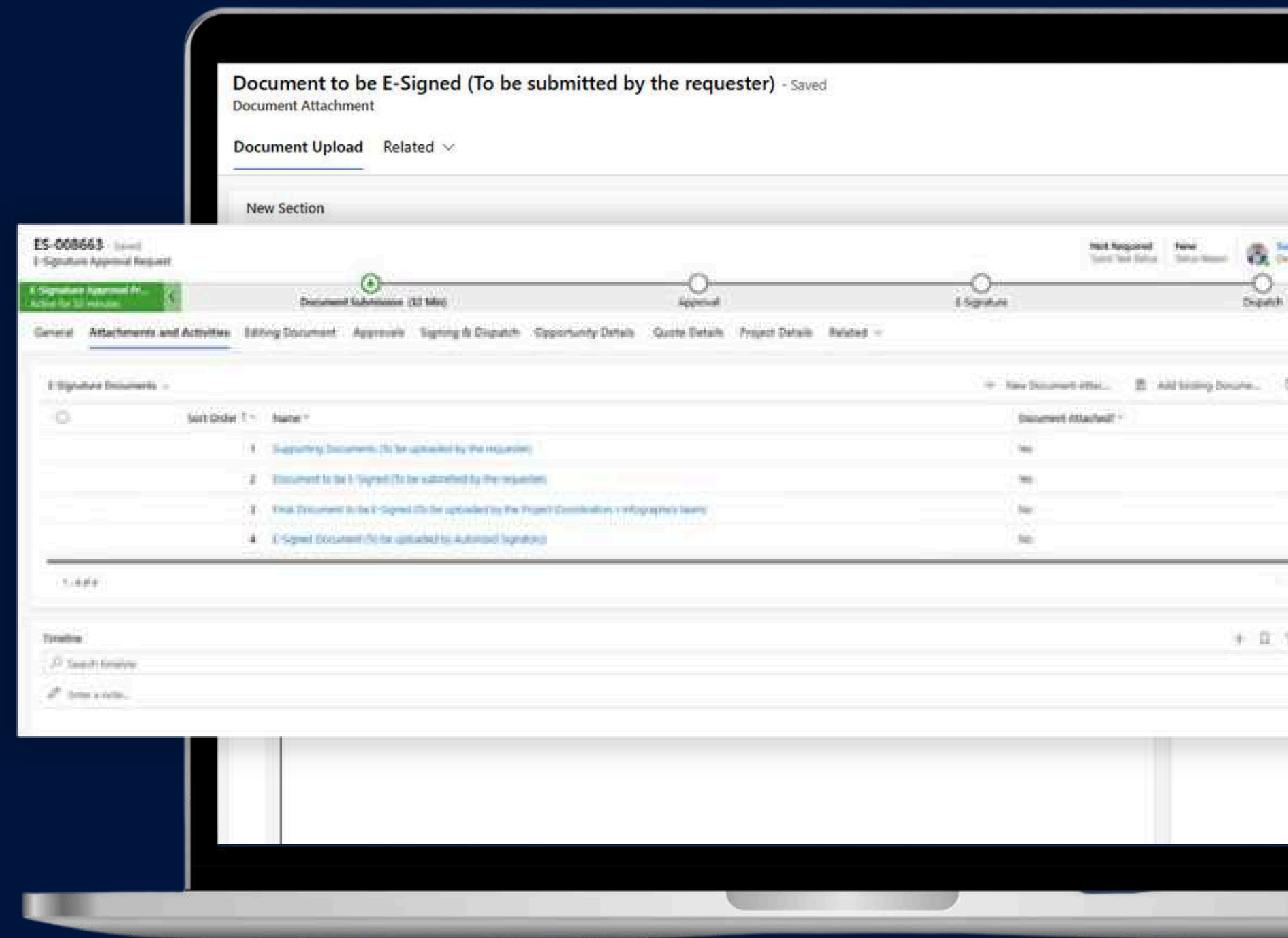
CRM-native initiation with pre-filled signer roles
drawn from engagement data.



Automated routing & timestamped audit trail
for real-time visibility and governance.



Seamless continuity
with Client Report Issuance and Dispatch modules—next steps trigger automatically once signing completes.





VIDEO



FACTSHEET

Document Processing (DP) System

Centralised platform governing the preparation, review, approval and dispatch request.



Structured request initiation

captures client and departmental details via a project code, with optional e-signature or dispatch tasks.



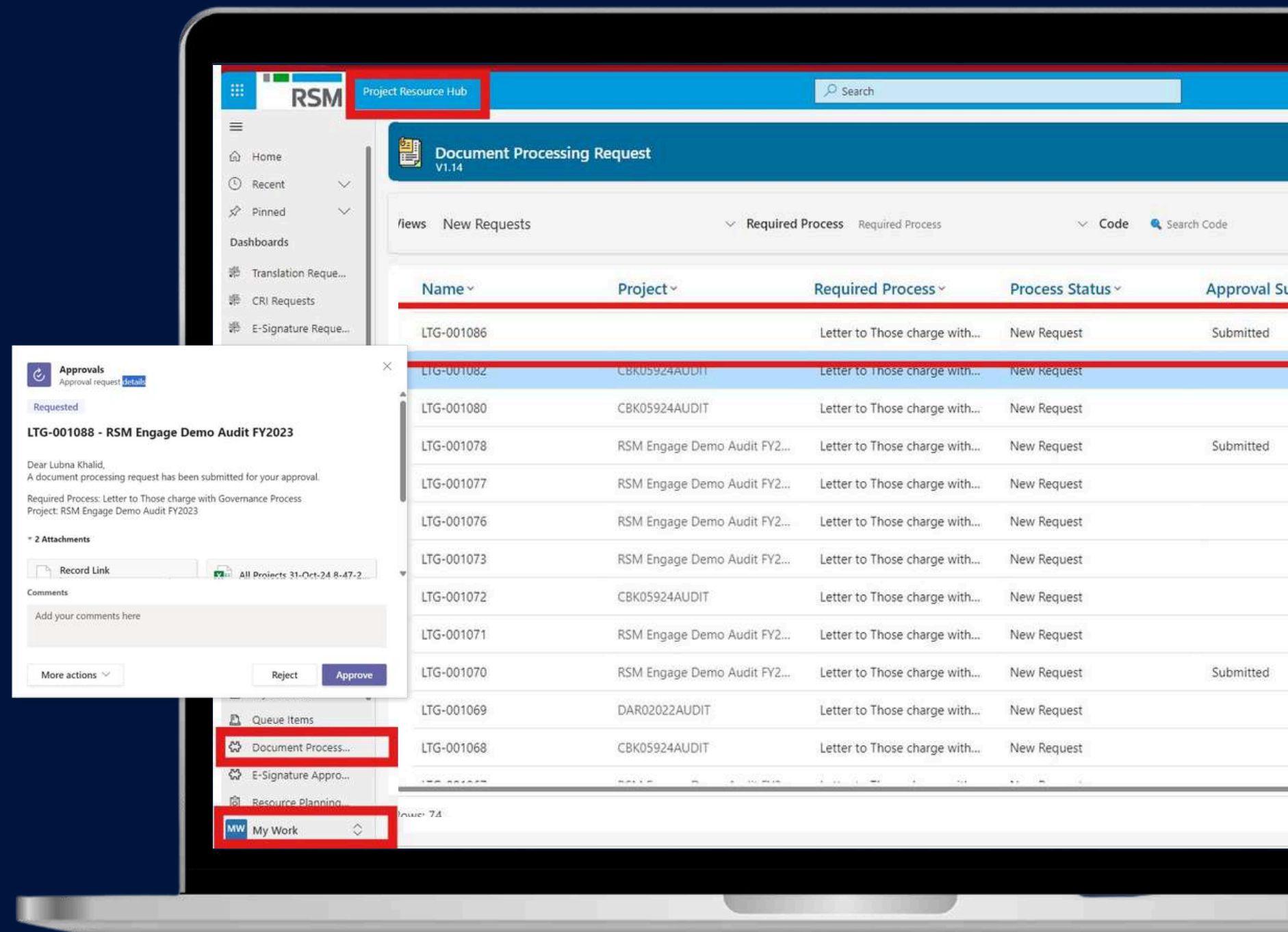
Role-based, multi-stage review & approval

Outlook / Microsoft Teams alerts and a complete "Approval History" for full traceability.



Integrated upload & status tracking

monitor every document/report from draft through final dispatch in one view.








Our Value Proposition






RSM in Kuwait: What Sets Us Apart?

Technology That Delivers Better Client Outcomes

Traditional Firms Challenge

-  Manual, paper-based processes
-  Limited visibility into engagement status
-  Reactive compliance management
-  Siloed systems and data
-  Standard turnaround times

RSM in Kuwait

-  Automated, AI-powered workflows
-  Real-time tracking and transparency
-  Proactive compliance with built-in checks
-  Integrated ecosystem with seamless data flow
-  Faster delivery with higher accuracy

Impact Through Digital Enablement

Technology strengthens how we serve clients, manage our business and prepare for the future. Our digital platforms improve efficiency, transparency, accountability, and collaboration across every engagement.



For Our Clients

Clear visibility into progress and faster, more transparent engagement.



For Our People

More time for high-value activities as routine tasks are automated.



For Our Business

Efficiently scale operations while maintaining quality and compliance.



For Our Future

Continuously adapt and innovate to meet evolving market demands.

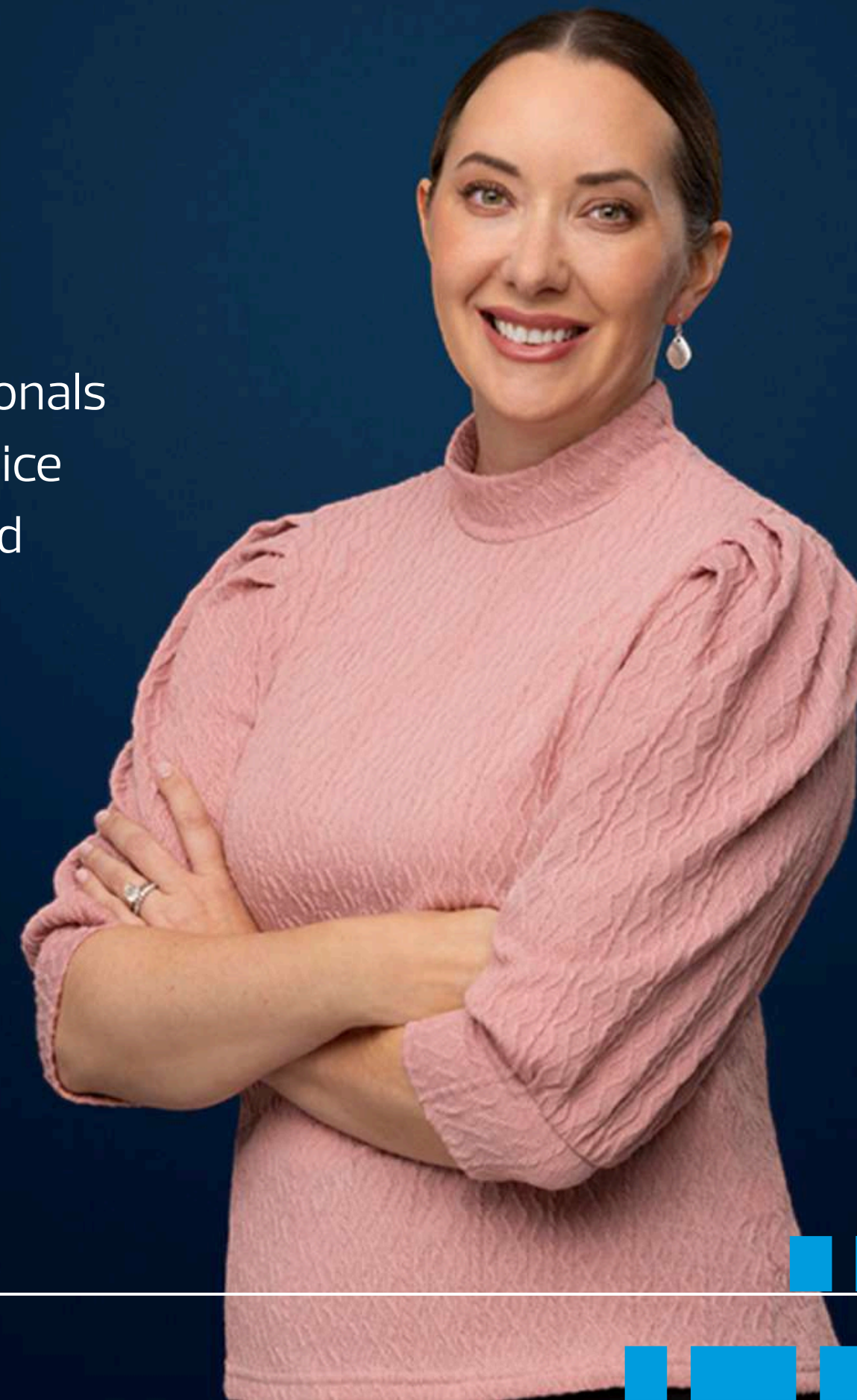
Enabling Smarter Decisions with Practical Technology

Our platforms simplify routine and compliance tasks so professionals can focus on value-added work. Integrated directly into our service model, these tools provide clients with clarity, accountability, and transparency—without disrupting workflows.



SCAN TO LEARN MORE

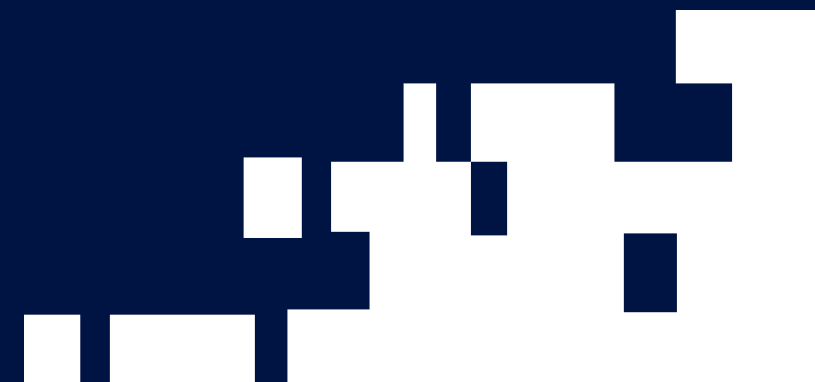
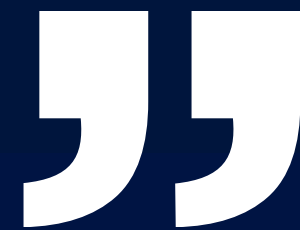
OR [CLICK HERE](#)





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RSM in Kuwait






RSM in Kuwait

Arraya Tower, Floors: 41 & 42, Abdulaziz
Hamad Alsaqar Street, Sharq, P. O. Box
2115, Safat 13022, Kuwait
www.rsm.global/kuwait

 **Website**
www.rsm.global/kuwait

 **EMAIL**
connect@rsm.com.kw

 **TEL**
+965 22961000

 **WhatsApp**
22410010

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