



Customer story

How a federal OIG evaluated the market and selected TeamMate



A mission-critical decision

For the Office of Inspector General (OIG) at the U.S. Department of Labor, audit management technology is not simply an administrative system. It supports the planning, execution, reporting, and follow-up activities that enable the organization to fulfill its oversight mission and provide accountability to the public.

When the OIG reached a decision point regarding its audit management platform, leadership viewed it as an opportunity to take a deliberate and comprehensive look at the market, but timing was tight. The objective was not to replace software for the sake of change. The objective was to determine which solution would best support the organization both today and in the years ahead.

Leading the effort was Grover Simmons, Director of Quality and Operations Management. Having previously served as an Audit Director, Mr. Simmons brought both operational and practitioner experience to the process. At the same time, the organization was navigating staffing reductions and significant changes across government, making the decision even more important. Expectations for delivering high-quality oversight remained unchanged despite having fewer resources available.

The organization needed a solution capable of supporting continuity of operations, minimizing disruption, and helping auditors work effectively in the future. Rather than assuming the answer, the OIG chose to conduct a structured evaluation of the available options.

Building an evaluation framework

Despite some time pressures, the OIG approached the project the same way auditors approach any significant engagement: establish criteria, gather evidence, evaluate alternatives, and reach a conclusion supported by facts.

Mr. Simmons assembled a committee that included audit managers, senior auditors, writer-editors, IT professionals, and other stakeholders who relied on audit information in different ways. The goal was to ensure the evaluation reflected the needs of the entire organization, not just a single user group.

The team began by defining what success would look like.

A detailed requirements assessment was developed covering workpapers, planning, fieldwork, reporting, recommendations tracking, time management, and risk management. Stakeholders identified the capabilities they relied upon today while also considering what the organization would need in the future.

The committee challenged itself to think beyond current processes. Rather than asking only how to replicate existing workflows, the team focused on broader questions:

- How can we improve our current processes?
- What capabilities will we need three, five, and seven years from now?
- What functionality do we wish we had today?
- How can technology better support the mission in the future?

This future-focused perspective became a defining principle throughout the evaluation.

Evaluating the market

The committee evaluated a range of audit and case management platforms through vendor demonstrations, government-focused industry events, product briefings, and deeper follow-up reviews.

One key component of the process was participation in FAACETS, a government-focused event where multiple vendors demonstrated their solutions and answered questions. The event provided the team with an opportunity to survey the market, compare approaches, and identify which solutions warranted further investigation.

From there, the OIG narrowed its focus and conducted more detailed

evaluations with vendors that appeared to be viable candidates.

The process was intentionally evidence-based.

Rather than comparing vendors against one another through subjective impressions, each solution was evaluated against the OIG's requirements framework. The committee focused on whether a platform could satisfy the organization's operational, reporting, security, and long-term strategic needs.

Several themes quickly emerged.



Supporting the full scope of oversight work

One important consideration was the range of work performed by the OIG.

While audits represent a significant portion of the organization's portfolio, approximately 30 percent of engagements consist of inspections, evaluations, alert memoranda, and other forms of oversight work.

The committee recognized that a solution optimized for one engagement type might not necessarily support the broader portfolio. The selected platform needed to accommodate multiple workflows while maintaining the structure, documentation, and oversight capabilities expected within the organization.

As Mr. Simmons explained:

"An important consideration was the range of work the OIG performs. While many of its engagements are audits, roughly 30% of the portfolio consists of other types of work, such as inspections and evaluations, non-GAGAS engagements, including alert memos. The team needed a system that could support this broader portfolio, not just a standard audit workflow."

As the evaluation progressed, the team found meaningful differences among vendors in their ability to support this broader operational model.

"If this is a product that you believe in, you can explain why you believe in it and give me a level of comfort, or reasonable assurance, as we call it. You can give me reasonable assurance that, over this five-year agreement, I can rely on you and that whatever issues arise, you're going to help me work through them."

Grover Simmons
Director of Quality and
Operations Management



Measuring solutions against real-world requirements

The committee's requirements matrix became the foundation of every discussion.

Each vendor was evaluated against the same set of needs. The question was not which product appeared most modern or generated the strongest demonstration. The question was whether the product addressed the organization's most important requirements. Capabilities related to planning, fieldwork, reporting, recommendations follow-up, risk management, supervisory oversight, operational reporting, and long-term adaptability all carried significant weight.

This disciplined approach made it easier for the team to distinguish between solutions that were impressive in isolated areas and those that could support

the organization. As the evaluation progressed, TeamMate consistently met more of the organization's highest-priority requirements than competing alternatives.

For Mr. Simmons, the outcome became clear because the committee had already agreed upon what mattered most. When the committee reviewed the results, TeamMate demonstrated the strongest overall alignment with the capabilities the OIG considered most important.

According to Mr. Simmons, the final decision was not particularly close. TeamMate created a meaningful gap between itself and competing alternatives when measured against the organization's prioritized needs and long-term objectives.

Balancing modernization with continuity

The evaluation was not focused solely on functionality. The committee also considered the practical realities of implementation, adoption, and organizational change.

Many users had spent years working within established audit processes. Reporting frameworks, terminology, workflows, and associated Power BI reporting were deeply integrated into day-to-day operations. The organization understood that change would occur regardless of which solution was selected. However, the scale and complexity of that change varied significantly among vendors.

TeamMate Audit represented a modernized platform and although not a direct one-for-one replacement for TeamMate AM (their earlier audit management tool), users could recognize familiar concepts, workflows, and practices. This reduced the disruption associated with transition and helped the organization preserve operational consistency while moving forward.

For the committee, continuity was not about avoiding change. It was about enabling meaningful change without creating unnecessary operational risk. As Mr. Simmons observed, people do not necessarily dislike change; they dislike being changed in ways that force them to abandon practices that already work.



Security and future readiness

Security also served as a foundational requirement.

As a public-sector organization handling sensitive audit and investigative information, the OIG required confidence that any solution could satisfy stringent security expectations. Solutions that were not FedRAMP authorized were effectively eliminated from consideration.

At the same time, the committee looked beyond immediate implementation needs. The team evaluated how vendors were positioned to support future innovation, including emerging technologies such as artificial intelligence.

For the OIG, future readiness was not simply about adopting new technology. It was about adopting technology responsibly. Auditors need transparency, traceability, and confidence in how information is generated, analyzed, and presented. Any future innovation would need to support those principles rather than compromise them. As a result, the committee considered whether prospective vendors appeared capable of supporting that long-term vision.

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Choosing a long-term partner

While continuity, implementation considerations, and long-term support all played important roles, those factors came after the organization had completed its requirements-based assessment.

TeamMate first distinguished itself through functionality and fit. The subsequent considerations around continuity, familiarity, and long-term partnership reinforced a conclusion that had already been supported by the evaluation itself.

The organization was not purchasing software for a project measured in months. It was entering into a relationship expected to support mission-critical work for years.

As the evaluation progressed, Mr. Simmons and his team paid close attention to how vendors engaged throughout the process:

- Were questions answered thoroughly?
- Could representatives explain not only what the product did, but why it worked the way it did?
- Did they demonstrate confidence in their own platform?
- Would they be capable of helping the organization navigate future challenges?

These considerations mattered because the OIG needed confidence that the selected provider would remain a reliable partner throughout the life of the agreement.

By the conclusion of the evaluation, TeamMate had distinguished itself not only through functionality, but also through its ability to address questions, provide clarity, and demonstrate a commitment to supporting the organization over time.

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From selection to implementation

The transition to TeamMate Audit reinforced many of the conclusions reached during the evaluation process. Implementation requires learning, adaptation, and preparation across the organization. The OIG worked closely with TeamMate resources to understand differences between platforms, prepare internal champions, and address operational questions as they emerged.

The process also highlighted the value of partnership. When challenges arose, the focus was not on identifying limitations. The focus was on identifying paths to solutions.

One example involved reporting requirements that extended beyond standard capabilities. Through discussions with TeamMate specialists, the OIG

identified the Reporting API as a way to preserve important reporting processes and maintain continuity around milestone tracking and operational reporting.

For the organization, the experience reinforced an important lesson: successful technology partnerships are not defined solely by what a product can do on day one. They are defined by an organization's ability to achieve the outcomes it needs over time.

As implementation progressed, TeamMate's responsiveness reinforced the confidence the committee had developed during the evaluation process. When questions emerged, the focus was not on explaining why something could not be done, but on identifying ways to achieve the desired outcome.



Advice for other audit organizations

Reflecting on the experience, Mr. Simmons offers straightforward advice for organizations evaluating audit technology.

- Start by understanding your organization's needs.
- Bring stakeholders together.
- Look beyond current processes.
- Ask what capabilities will be necessary in the future.
- Most importantly, ask questions and continue asking them until the answers are clear.

Technology decisions on this scale represent long-term commitments. Organizations should challenge assumptions, explore alternatives, and ensure they fully understand how a solution will support their mission before making a decision.

For the Department of Labor OIG, that approach led to a clear outcome.

The organization conducted a rigorous evaluation of the market, established objective criteria, assessed multiple alternatives, and selected the solution that best aligned with its requirements.

The result was not simply the continuation of a familiar platform; it was the conclusion of a disciplined evaluation process that identified TeamMate as the solution best equipped to support the OIG's operations, priorities, and future direction.

In the end, the decision reflected functionality, security, configurability, change management, implementation support, reporting flexibility, future readiness, and confidence in a long-term partnership. Most importantly, it reflected a process grounded in evidence. The OIG defined what mattered, evaluated the market against those criteria, and concluded that TeamMate provided the strongest overall fit. The meaningful gap that emerged during that assessment made the final decision a confident one.



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