



CASE STUDY

Maximizing efficiency for a better client experience

Henry+Horne by the numbers

3+	Years as a Suralink client
50	Audit users
10	Tax users
3 hrs	Average time spent managing engagements per week before
30 min	Time spent managing engagements with Suralink
83%	Reduction in time spent managing engagements



THE COMPANY: EXPERIENCE THAT FOCUSES ON RESULTS

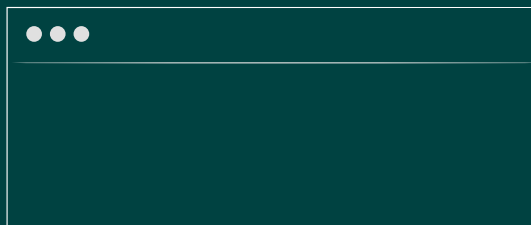
Henry+Horne was founded in 1957 by two CPAs to provide tax, accounting and business consulting services. Sixty years later, its team of approximately 150 highly skilled professionals are still focused on its clients' success and overall financial well-being.

THE CHALLENGE: MANUAL PROCESSES LEAD TO INEFFICIENCIES

Like many leading firms, Henry+Horne was struggling to manage the PBC process. For a large company with multiple offices and multiple consolidations, just staying on top of which clients were providing which documents was a full-time job for several people. “For easier jobs, we were spending an hour a week. But that was for smaller, more organized clients,” says Kevin Bach, Partner, at Henry+Horne. “For bigger, messier jobs, we were easily spending four to six hours per week just managing engagements.” The firm was relying on a combination of Excel files and a document portal. While this approach made managing engagements possible, it was far from efficient. For exam-

ple, a client would upload file called ABC, but the firm had no way of knowing which task or category that file belonged to and would spend valuable time communicating back and forth with the client to figure it out. Additionally, they would spend time weekly trying to verify which documents had and hadn’t been received.

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THE SOLUTION: SURALINK PBC AUTOMATION

“We were wasting so much time managing files the old school way,” says Bach. “That’s really what prompted us to do the research and find out what was out there in terms of technology.” Henry+Horne evaluated several options, but after demoing Suralink, Bach says it was a “no-brainer.” After getting buy-in from partners and team members, Henry+Horne implemented Suralink in December of 2016 to all 50 of its audit users and has expanded to 10 of its tax users. The firm created all new templates and standardized them by vertical— nonprofit, construction, benefit plan, etc.—ensuring that all engagements moving forward would be consistent and easy to use for clients.






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Kevin Bach

Partner

Henry+Horne



THE RESULTS FOR THE FIRM: INCREASED EFFICIENCY AND IMPROVED CLARITY

“The biggest thing has just been having a simple means of organization,” says Bach. “It doesn’t sound that impressive, but what that means is we’re really saving time and money on a job because we’re not hunting through hundreds of documents trying to find what is or isn’t missing.” The firm also now has access to prior year documents. Before Suralink, if the firm needed to see what a client provided, they were flying blind. Now, the firm can go back and look at previous years. The firm now has an answer for clients when they say, “That’s just not doable,” because Henry+Horne knows the clients were able to provide those documents the year before. Suralink also gives Henry+Horne an earlier start. For many clients under the old system, PBCs would only be ready about a month before the engagement. Now Henry+Horne can take 2018 engagements, for example, and roll them over to 2019, make edits, and activate them. “This really just gives us a jumpstart,” says Bach. “We now have PBCs in clients’ hands before the year is even completed. It’s a huge timesaver.” In fact, before Suralink, the firm was spending anywhere

from one to six hours per week managing engagements. Now, accountants just run a status report out of the platform and report on it during 30-minute meeting. Finally, Suralink provides additional clarity. The management team at Henry+Horne views Suralink as a positive asset. The management team has direct line-of-sight into what the audit team has or hasn’t accomplished in an organized and clear fashion.

THE RESULTS FOR THE CLIENT: A BETTER END EXPERIENCE

At the beginning, Henry+Horne's clients were apprehensive about the new technology. The firm switched from a piecemeal "ask for it as we go" approach to asking for all the assets up front. Before the firm implemented Suralink, the needs list was approximately 40 items. After implementing Suralink, it jumped to 60 items. However, by having a comprehensive list up front, the firm no longer has to make ad-hoc requests via email throughout the process. It's saving time and making the process more efficient for both the firm and clients. "Looking back, we don't have any clients who see it as a negative. We've had such positive feedback about it from our clients."

Another benefit for both firms and clients is the live support included in every Suralink contract. "We've used live support," says Bach. "We haven't had that many issues, but if we have had an issue, they've been super responsive."



THE CONCLUSION: SURALINK IS A SMART BET

Using Suralink, Henry+Horne has streamlined the PBC process, improved efficiency across the firm, and saved money. “I don’t think there’s really a better way to say it other than our clients really like it and you’re not making a smart decision if you don’t use Suralink,” says Bach.





Suralink is the leader in request list and document management, helping businesses simplify the document exchange process while improving the client experience.

The company's cloud-based application integrates a dynamic request list and assignment workflow solution with a secure file hosting platform to serve as a single location for client interaction. Suralink's technology, combined with its industry expertise, helps more than 750 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the document exchange process.

CONTACT US

sales@suralink.com
801.203.0002

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