



CASE STUDY

# Organizing for *Business Impact*

## The Company: Extraordinary Quality, Service, and Value

Rogers & Company provides industry-leading audit, assurance, tax, and advisory services to many of the most recognized national and international nonprofit organizations. Choosing to exclusively serve tax-exempt organizations, Rogers & Company's clients represent a broad range of nonprofits, including public and private charities, associations, foundations, advocacy groups, arts and cultural institutions, scientific and research organizations, health and welfare groups, educational institutions, and many other nonprofits.

While other firms focus on being bigger, Rogers & Company focuses on being better. Its practice model is designed to ensure extraordinary quality, service, and value.

## The Challenge: A Limited Portal and Manual Processes

The team at Rogers & Company prides itself on providing quality, service, and value. However, it was challenging to provide the level of service they prided themselves on while remaining efficient using their current tools: spreadsheets and a document portal.

The team was using spreadsheets and email to communicate PBC requirements. "Emailing back and forth was tricky and time consuming," says Elizabeth Moran, Firm Administrator at Rogers & Company. "As an employee of the firm, I can feel overwhelmed looking at our PBC lists, and I think clients may feel the same way. Updating a long and detailed spreadsheet was making the process difficult."

And that was just on the PBC side. The document portal they were using also came with challenges. "It



was abysmal," says Moran. "We had limited storage space, we had to download every document separately, and setting up new clients was tedious."

Wanting to improve the overall process, Moran began researching alternative options. What she discovered was an integrated PBC portal that could solve both her challenges.

### **The Solution: Suralink's Integrated PBC Portal**

"The team at Suralink was really good," says Moran. "They understood exactly what it was we were doing. They understood the process and were super responsive."

But it wasn't only the team at Suralink that impressed Moran. The product itself was superior. "I loved the layout of the platform. It was very user-friendly. It was the same price as what we were previously using, but offered a lot more functionality."

After choosing to move forward with Suralink, the implementation process went smoothly. As the administrator, Moran is able to create PBC templates from the lists auditors have sent to clients in the past. And the auditors have been able to pick it up quickly and see quick results.

### **The Results: Better Organization for a Better Client Experience**

"It sounds simple, but the biggest benefit for us has been how organized Suralink has made us," says Moran. "Our team loves how it helps get documents back from clients in a timely manner."

The team at Rogers & Company has also benefited from several of Suralink's innovative features, including:

- **Downloading new files all at once: Previously, the auditors would have to click and download each individual file, which was frustrating and time-consuming.**

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**Elizabeth Moran**  
Firm Administrator  
Rogers & Company

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**Elizabeth Moran**  
Firm Administrator  
Rogers & Company

- **Tracking engagement statuses: The team can now see when a request has been fulfilled and accepted, right from the portal.**
- **Sharing engagement statuses: Follow-up with clients is easier, faster, and more transparent, since auditors can now simply send a report instead of composing an entire email and updating a spreadsheet.**
- **Scheduling custom notifications: Each auditor can choose which notifications they want to receive and when—ensuring they’re always up to date on engagements.**
- **Taking advantage of live support: Whenever the team has questions, they can reach Suralink through chat or email.**

“I’ve used the support feature—either through chat or email—a couple of times,” says Moran. “They’re always just super responsive and helpful.”

While all these features are helpful, the real benefit to Rogers & Company has been in the time they’re

saving and the improvement in client satisfaction. “We’ve had good feedback across the board,” says Moran. “There is definitely an element of time and cost savings. Auditors are getting more complete PBCs before they begin field work and clients are happier because it’s a more organized way to complete a complicated process.”

### **The Conclusion: Suralink Is a Significant Upgrade**

Using Suralink, Rogers & Company has consolidated and streamlined the PBC process, while replacing two inefficient processes. It has also improved the client experience, increased efficiency, and reduced costs. “It’s been a significant upgrade over our old solution. I’d definitely recommend it,” says Moran.



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 275 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the document exchange process.

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