



CASE STUDY

Providing a smooth cross-departmental implementation for a top 100 firm

THE COMPANY: TOP 100 FIRM, BEST OF THE BEST

Doeren Mayhew is a leading group of CPAs and trusted advisors who go beyond traditional accounting to help mid-sized companies grow and prosper. Founded in 1932, they are currently a top 100 firm recognized globally and applauded nationally among **INSIDE Public Accounting's "Best of the Best."**

With offices in Florida, Michigan, North Carolina, Texas, Zurich, and London, Doeren Mayhew's staff of more than 500 is organized into dedicated groups that cater to industry or service needs. Combining a deeply rooted history, vast expertise, and a progressive mindset, they offer insight into the business, oversight to ensure best practices, and foresight for what's ahead.



UNEXPECTED CHALLENGE: SUNSETTING SOFTWARE

When the team at Doeren Mayhew heard that CCH Wolters Kluwer was sunsetting its client portal which they were partly relying on in their audit process, in addition to less efficient methods like email and Excel request lists, the firm started looking into alternatives. Adriana Vargas, Eastern Facilities Manager, is entrusted with overseeing the setup for all eastern region offices. Her responsibilities include IT and software implementations, and she also works with shareholders at each location to make sure all the firm requirements are met when opening new offices or managing existing ones.

Because Vargas worked with the Financial Institutions Group (FIG), where most of the CCH users were, she was responsible for managing CCH and subsequently became the point person for researching new systems to replace

the CCH client portal. When it came down to looking at new options, Vargas says, ***“My director and I were looking for something that could be hands-on for our team, but also gave us more administrative control.”*** They also wanted to see if they could avoid some of the challenges the team had experienced while using CCH, which included size and file type restrictions and the inability to download multiple files at once. The process of downloading files became so tedious that the team eventually began employing one person for the sole purpose of downloading files one by one.



PATH TO SURALINK: THE OBVIOUS CHOICE

Vargas says that the firm evaluated Suralink along with two other vendors. After reviewing the three demos, Vargas says, “What stood out with Suralink was that everything was set, from the price to the system, and it already had the features we needed. We didn’t need to wait for Suralink to develop what we needed, it was already there.” The competitors they looked at were comparable in terms of price per-user; however, it would be expensive for the competitor to build out what they needed. Vargas says, “Although they quoted us 3–5 months to complete the build-out, it would have required a lot of work on our end to walk them through the features and functionality we needed. We didn’t have time for that, and it simply wasn’t necessary with Suralink.”

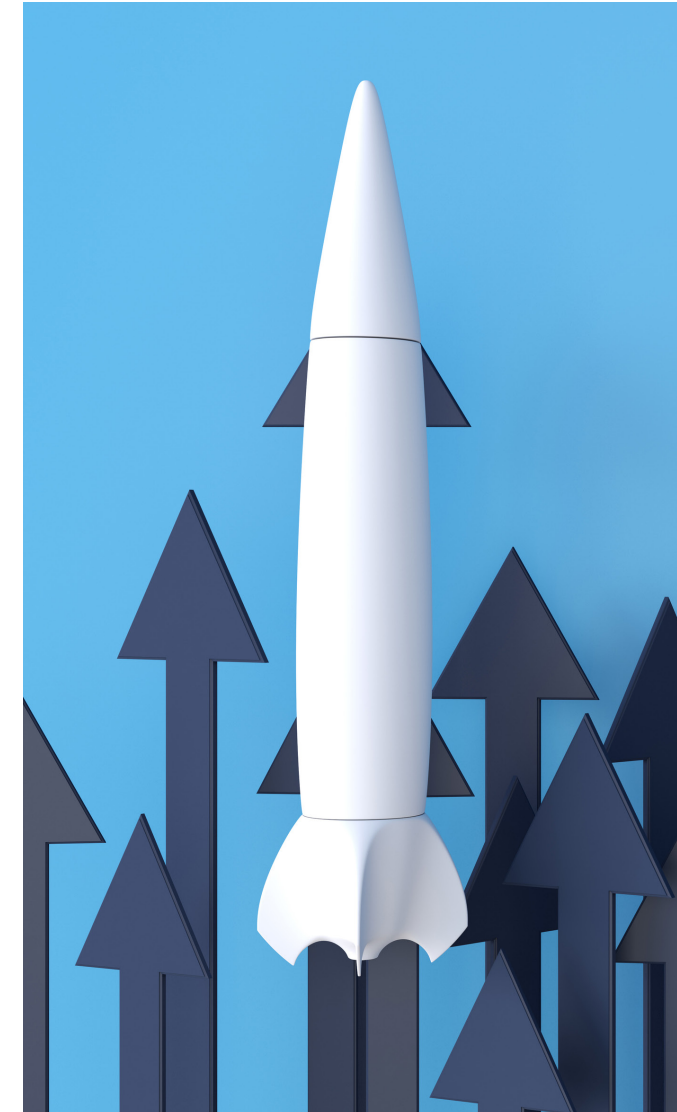
One of the competitors was outside the U.S., which was an issue for the firm for a variety of reasons—but especially because of support and compliance. Vargas said, “We can adhere to

all the regulations when it comes to data storage in the U.S. and internationally through Suralink’s data center locations here and abroad.”

Vargas also mentioned, “Another benefit was that a lot of our clients already used Suralink. When we were getting the client feedback saying they liked Suralink, it didn’t make sense to look for something else.”

Upon looking at the financials during due diligence, the COO and Managing Partner noticed an opportunity to save money in the long term with Suralink by applying it cross-departmentally. Vargas added, “**We now use Suralink in more than 15 departments.**” The departments include audit and assurance, outsourced accounting, employee benefit plans, M&A and transactional advisory, international advisory, tax compliance and planning, real estate advisory, IT and cybersecurity, and others.

Lastly, another differentiator was the knowledge of the sales team. Vargas says, “The steering committee was able to spend time asking more thoughtful process related questions because the sales representative knew the product inside and out.”





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ADRIANA VARGAS

Eastern Facilities Manager, Doeren Mayhew

**IMPLEMENTATION
PROCESS:
INSTANT & SMOOTH**

Once the team had decided to move forward with Suralink, the firm started the implementation process.

Doeren Mayhew initially started with the Financial Institutions Group and then implemented it across the other departments. Vargas says, “The customer success team and Ryan were amazing. They did training with every department. They also provided us with details to include in our client marketing outreach to introduce them to Suralink. ***After the email blast went out to clients letting them know we’d be using Suralink moving forward, we did not get one single complaint. Although transitions are always stressful, the implementation was very smooth.***”

She added, “The times I reached out to customer support through the live chat, the responses were instant. Even in rare cases when they don’t know the answer, they communicate effectively with their customer success team and they follow up promptly.” Her previous experiences with live support have often been frustrating. “Time is valuable, and with Suralink I know I’m speaking to real people, not a machine—they’re amazing.”


Vargas jokes with her team that, “We went from a broken down Toyota to the Rolls Royce of portals.”

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As far as implementation, it couldn’t have been any easier. We just provided a list of clients, along with the team users, and in the blink of an eye it was in the portal.

ADRIANA VARGAS

Eastern Facilities Manager, Doeren Mayhew



BENEFITS: MONEY & TIME SAVINGS, ORGANIZED PROCESS

Money Savings. A feature that has made a big impact for the Doeren Mayhew team is the ability to provide reports within Suralink. “We’re saving a lot of money by being able to deliver the reports to clients instead of putting them in binders and mailing them out. Clients have easy access and it saves us time and money,” says Vargas.

Time Savings. Suralink is also cutting down the amount of time team members spend on prep work, so they’re able to spend more time on the actual audits and assisting clients. “The ability for clients to simply drag and drop files into the request list and our team to download all files in an organized structure saves us valuable time throughout the process.” Vargas added, “The fact that our clients can easily see what is requested has cut down on the amount of the time we need to spend on the phone with clients.”

Organized Process. The firm can also separate various departmental requests by different engagements, which wasn’t possible for them before Suralink. Vargas says, “Each department can create engagements and within each engagement, create requests specific to their needs. It organizes the process and makes it easier on the client and our team.”



CONCLUSION:
SATISFACTION FROM
START TO FINISH

Overall, the firm is very satisfied with the way the entire process was handled, from sales to implementation and support. Doeren Mayhew is excited about the path ahead with Suralink and is in the process of expanding the use internally.

“Our team loves the features of Suralink and it’s very user-friendly,” Vargas says. “We now have more than 300 licenses and we’ll soon be adding more. We’re also in the process of looking to replace Sharefile with Suralink’s Secure File Sharing to help our tax team with the simple client requests where only a few items need to be exchanged.”

“With Suralink, we’re now spending time on the audit instead of spending time on the back and forth with clients about files,” says Vargas.





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

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