Case Study
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Using a Centralized Platform
to Improve Effectiveness

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CASE STUDY

Using a Centralized Platform to Improve Effectiveness

Boyum Barenscheer was founded in 1975 when Norlin Boyum and Brian Barenscheer joined together with a staff of five to become Boyum & Barenscheer. Their vision was to create a CPA and advisory firm that offered exceptional service and insight to its clients with the benefit of warm and personal service.

THE CHALLENGE:

In 2019, Boyum and Barenscheer's audit team was using a manual process to manage the provided by client (PBC) process. The team was using an Excel spreadsheet to manually track requests and then using email to request, share, and receive documents from clients.

There was an overall lack of organization. Teams were creating folders in a portal where clients could upload files. Because the portal lacked a dynamic request list feature, clients would upload files and there was no way to track them. The portal also lacked a way to track accepted and returned requests, so old, returned files were jumbled together with new files.

Additionally, since multiple team members were working on the same engagement, staff members would accidentally email a client the same request multiple times, unaware that another team member had already asked for it.

"The process was cumbersome and time-consuming," says Jasmin McKenzie, Senior Accountant II at Boyum Barenscheer. "There was a lot of confusion all-around."

> " Having everything in a centralized location has made our team more effective. And our clients think it's easier and less cumbersome. It's been a win-win.
>
> **Jasmin McKenzie**
> Senior Accountant II

THE SOLUTION:

By September of 2019, the team at Boyum Barenscheer decided to partner with Suralink to implement its automated request list management solution. The team quickly started using Suralink's features to simplify and streamline the process, including:

A single point for client interaction

"Multiple people can upload documents to one spot, and download documents from one spot. It's a secure portal too, so staff and clients don't have to send an encrypted email."
— **Matt Nelson**, Senior Accountant II

Roll-forward and templates

"The roll-forward feature and templates also just help with timing. You can roll forward an engagement from year to year, which means you don't have to worry about creating a list every time or sorting emails after they've started coming in."
— **Jasmin McKenzie**, Senior Accountant II

At-a-glance dashboards and engagement trackers

"With Suralink, we don't need to schedule as many check-ins for fieldwork because clients can see what's been accepted and what's been returned. Instead of scheduling daily check-ins, they can see what we've done and if we've added any additional requests."
— **Noah Jacobson,** Senior Audit Associate

Categories and sub-categories

"I really like being able to have different categories and being able to accept or return different requests."
— **Jasmin McKenzie**, Senior Accountant II

Privacy and locking

"I love the lock features. I work on a lot of EBP plans that contain a lot of private information. Before Suralink, we didn't have a way to keep that information private. But now with Suralink's lock feature, I can have everything in one central location, and I can make sure that the people who should see it can, and those who shouldn't, can't."
— **Noah Jacobson,** Senior Audit Associate

THE RESULT:

Before Suralink, the team spent a lot of time tracking down documents from clients who were sending files in small batches via email. There was a lot of back and forth that required a lot of follow-up.

"It improves efficiency," says Nelson. "Depending on the size of the audit it saves us a minimum of 2–5 hours." And not only does Suralink improve efficiency for the staff, but it also helps management save time in planning. "Suralink saves at least a couple hours in the planning stages of an engagement. We can roll an engagement forward or copy an existing engagement. And we don't have to waste time organizing emails. That's a huge timesaver," says McKenzie.

THE CONCLUSION:

Both the team at Boyum Barenscheer and their clients have seen improvements in the process. "Having everything in a centralized location has made our team more effective," says McKenzie. "And our clients think it's easier and less cumbersome. It's been a win-win."