

CASE STUDY

# Investing in Technology to Secure the Future

The team at CDH was looking for a more efficient way to share, manage, and track PBC lists. At the time, they were using a combination of Excel, email, and a file transfer solution to manage the process, but knew they needed a more sophisticated solution.

"I'd get a jump drive from the client with 50 files, or they'd email me 50 files, and I would have to try and find and mark it on this giant Excel list," says Emily Hoaglund, Assurance Manager at CDH.

In December 2018, the team decided to implement Suralink's Request List Management solution. "We're always looking for ways to use technology to make our lives and our clients' lives easier and more effi-

cient," says Hoaglund. The team quickly noticed the difference in their process: Suralink has provided better organization and cohesion with the client document request process. They could see, at a glance, which requests were still outstanding and which had been completed. Instead of the back-and-forth required with email, the team can now direct clients to the portal (or look themselves) to see the status of any request or engagement.

The team also gets real-time notifications when a request changes status, so they don't have to be constantly checking if a document has been delivered. And they can use the Report Delivery feature to send final reports securely to clients and then check to ensure they were received.

**“Technology is the way of the future. We have to keep learning and keep up with tech trends or get replaced by firms who are using technology.**

**Emily Hoaglund**

Assurance Manager, CDH

## Challenges

- Excel documents and a secure file transfer solution made communicating with clients about the status of an engagement or document difficult
- Emails from clients would get lost or were hard to track and some clients were still using jump drives

## Solution

- Suralink's Request List Management solution

## Results

- Gained a holistic view of the engagement—what's outstanding and what's complete—at a glance
- Increased efficiency with real-time notifications that alert the team when a request changes
- Improved the client experience with a more organized document exchange process
- Simplified the process of giving clients access to final reports while still being able to track and view those reports



## About CDH

**Founded:** 1996

**Headquarters:** Itasca, IL

**Employees:** 92

**Regions:** North America, Europe, Asia



**“Suralink enhances our jobs and enables us to focus on the things machines can't do—like serving clients. We now spend time helping clients instead of spending time on tracking open items.**

**Emily Hoaglund**

Assurance Manager, CDH