



suralink

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ACCOUNTANTS | ADVISORS

CASE STUDY

DZA Achieves Enhanced Efficiency and Client Satisfaction with Suralink





Overview

DZA, an accounting and advisory firm located in Washington, serves healthcare and not-for-profit organizations in 21 states. The firm—which specializes in various areas including audit, advisory, tax, and other accounting service lines—faced significant challenges with their previous client portal solution, Sharefile. Frequent technical errors, a clunky user interface, and difficulties with document uploads led to client frustration and internal inefficiencies.

Seeking a more robust and reliable solution, DZA implemented Suralink, leading to immediate improvements across service lines, and fostering greater client and team satisfaction.





Optimized tax service delivery and proactive information flow

The DZA team successfully integrated Suralink into their specialized 990 nonprofit tax practice. By investing some time upfront to create custom templates within Suralink, DZA now has a standardized, yet flexible, approach to requesting information for their 130+ tax returns each year.

“We created our own templates because we had an idea of what we wanted to request. And then we just integrated those Excel templates into Suralink, which didn’t take too much time,” says Clayton Batts, Senior Tax Accountant. **This has eliminated the inefficiencies of clients sending partial information via email and greatly reduced the “number of touches” on a return.** Instead of multiple back-and-forth communications, DZA leverages Suralink’s status report feature to provide clients with clear, real-time updates on outstanding requests, enabling them to receive correct information more quickly—and ensuring that staff can complete engagements without having to go back to the client for more information.





Significant improvement in client satisfaction and adoption

A major pain point with the previous document request tool was the high volume of client complaints regarding login issues and document upload failures. Prior to Suralink, DZA's team would receive messages from clients experiencing errors with Sharefile. Since adopting Suralink, this has virtually disappeared.

“With Suralink, I haven’t received any complaints about a client saying they’re not able to log in or upload documents.”

– Brennan Pendleton, *Manager at DZA*

This stark contrast highlights Suralink’s superior reliability and user-friendliness from the client’s perspective. The single-page view for request lists and uploaded documentation further contributes to a smoother client experience, saving “mouse clicks” and improving overall efficiency. **Suralink has a 99.9% adoption rate with DZA’s clients, further underscoring its ease of use and client satisfaction with the tool.**





Suralink facilitates a “consistent 40 to 45 hour week” workload, improving team morale and reducing burnout.

Fostering work-life balance

THROUGH A CONSISTENT WORKLOAD

Suralink has seen widespread adoption across DZA, covering virtually all professional staff. This firm-wide embrace has contributed to a more consistent workflow and a better work-life balance for the team.

Clayton notes, “We’ve had a general improvement on getting information much earlier than just right before a deadline... we’ve had a more consistent workflow throughout the year.” This means the team has a more consistent workload during slower times of year, and is no longer overwhelmed with 50–60 hour weeks during peak seasons. Instead, Suralink facilitates a “consistent 40 to 45 hour week” workload, improving team morale and reducing burnout.

DZA’s transition to Suralink has yielded significant positive outcomes, addressing key pain points with their previous solution. From streamlining their specialized 990 tax process to dramatically increasing client satisfaction and fostering a more consistent workload for their team, Suralink has proven to be an invaluable asset. Its firm-wide adoption underscores its versatility and effectiveness in enhancing operational efficiency and improving the overall experience for both DZA’s clients and its dedicated staff.





The **trusted** platform for trusted professionals

Suralink is the leading client collaboration platform for today's accountants and is dedicated to addressing the Client Readiness Gap. Suralink's secure platform centralizes request and document management, enables workpaper preparation and review, improves visibility and accountability, and ensures teams and clients stay aligned and collaborative throughout engagement progress.

With enterprise-grade security and an easy-to-use interface, Suralink's award-winning client collaboration platform helps firms drive growth, increase profitability, improve customer satisfaction, and mitigate risk.

Suralink's open platform is leveraged by more than 800,000 users worldwide.

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