



CASE STUDY

Increasing efficiency
to support firm growth

Haynie & Company by the numbers

Offices	15
Employees	400
Suralink Users	127
Suralink Client Since	2014



THE COMPANY: BUILDING LONG-TERM RELATIONSHIPS BASED ON GROWTH, TRUST, FAMILY, AND SERVICE

Haynie & Company is a unique, full-service CPA firm specializing in audit, tax, accounting, consulting, and management advisory services. Since 1960, Haynie has grown from a single office to 15 locations and nearly 400 team members. The firm's vision is simple: exceeding expectations.

THE CHALLENGE:

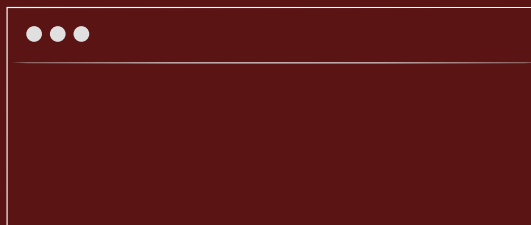
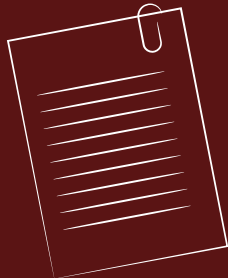
IMPROVING ORGANIZATION TO SUPPORT FIRM GROWTH

In 2016, Haynie & Company was experiencing strong growth; however, the team didn't feel like its internal PBC processes were efficient enough to support that growth. In fact, at that time, there were no formal processes for requesting and receiving information from clients.

Different team members were using different tools to request and share documents. For the most part, they were using spreadsheets and email to send lists back and forth. Depending on the client type and size, they might use a shared drive, but email was the primary method.

This led to confusion and miscommunication with clients. "We were constantly sifting through emails," says Ty Holman, Partner at Haynie and Company. "There was a lot of back and forth. The client would say, 'I didn't get this,' and we'd have to say, 'Yes, you did, and I emailed it on this date.' It just created a lot of confusion on big engagements."

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THE SOLUTION:

SURALINK'S DYNAMIC PBC AND APPROVAL WORKFLOW SOFTWARE

The team realized it needed a better way to handle the requests and documents coming in. Specifically, it was looking for a solution that would help support its continued growth and that it could use across different offices and different clients and engagement types.

"You can't always avoid the frustrations of going back and forth with clients," says Holman. "But we were looking for something that would help us eliminate at least some of it. That's why we wanted something like Suralink."





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If you're looking for something that's going to eliminate the headaches of managing requests, and receiving and transferring documents, Suralink works really well for us

Ty Holman

Partner, Haynie & Company

THE RESULTS: ORGANIZATION, EFFICIENCY, AND CLIENT SATISFACTION

As one of Suralink's earliest clients, Haynie & Company has ample time to experience the benefits of implementing Suralink, specifically organization, efficiency, and differentiating the client experience.

ORGANIZATION

Throughout the audit process, the audit team needs to request and share dozens to hundreds of documents. Suralink has helped solve the problem of keeping them all organized. Suralink helps the team to be very clear on what's open, what's left, and what it still needs from clients. There's no question as to what the requests are and what's been provided.

"Suralink helps us avoid frustrations," says Holman. "That's been big. If we get a new client and they're coming from another firm, it's generally because something didn't go well. At least 75 percent or more of the time, what didn't go well has to do with communication. It's almost always lack of communication or the confusion of going back and forth."

EFFICIENCY


Another main area of improvement has been in the efficiency of the audit process year over year. In the past,

when the team needed to start a new audit with a client, they had to go out, find the spreadsheet with the requests from the previous year, manually roll it forward, update information, pull it into an email, and write up an explanation. With Suralink the team can now just log in and the rollover process is done.

On the flip side of it, other efficiencies come by avoiding duplicating work and requests. For example, if two auditors are working on something that overlaps, rather than both of the auditors requesting the same document, the team at Haynie has been trained to check in Suralink to see if they what they need has already been uploaded.

A DIFFERENTIATED CLIENT EXPERIENCE

Finally, using Suralink has enabled Haynie to create a differentiated client experience. "Generally, clients love it, and it works well," says Holman. "When we do proposal meetings, a lot of times we'll highlight Suralink. We talk about what it is and what the benefits are. Usually if someone is going out and looking at a new firm, they've struggled with communication. What we've found is that a lot of clients really like having a tool like Suralink to manage the process. They like the idea of having something more streamlined."



THE CONCLUSION: INCREASING EFFICIENCY TO SUPPORT FIRM GROWTH

Suralink has improved the audit process enough that Haynie & Company now uses Suralink in other areas of the firm—from internal controls, services, compilations, reviews, non-audit services, and tax.

“If you’re looking for something that’s going to eliminate the headaches of managing requests, and receiving and transferring documents, Suralink works really well for us,” says Holman. “It’s definitely something I have a hard time seeing us going away from. It makes things so much smoother as you work through an engagement.”

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Partner, Haynie & Company



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

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