



 suralink

**MNP**



# Case Study

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## THE COMPANY: CONSTANTLY INNOVATING

MNP is a leading national accounting, tax and business consulting firm based in Calgary, Alberta, Canada. The firm has 117 offices, more than 7,100 team members and serves clients worldwide. MNP's Assurance Innovations Team is constantly looking for ways to make the firm's audit engagements high velocity and lower touch.



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**THE CHALLENGE:**  
AUTOMATING THE  
PBC REQUEST LIST  
MANAGEMENT  
PROCESS

“One of the aspects of audit that chews up a lot of time and has little value is managing the PBC request list,” said Darryl Humphrey, Ph.D., PMP, and Advisor of Assurance Innovation for MNP. “This is a difficult area to automate because every client and engagement has nuances. But some fundamental tasks are the same from audit to audit.”

Historically, MNP had managed PBC request-lists using Excel spreadsheets and email. They also built a client portal and tried some other PBC list solutions built on the spreadsheet foundation.

*But as the firm grew, they needed something more. Their search led them to start using Suralink in early 2021.*



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**THE SOLUTION:**  
SURALINK STREAM-  
LINES THE REQUEST  
LIST MANAGEMENT  
PROCESS

“Suralink gave us everything we needed to train the engagement team,” Humphrey said. “We held 11 training sessions and set up a system on our internal portal where people could watch training videos and then answer a few questions about the video so we’d know they completed the training.”

Humphrey appreciates that beyond managing the PBC list, Suralink provides an audit trail of who did what when. “Audits aren’t exactly adversarial, but clients do them out of necessity,” Humphrey said. “We wanted the ability to track metrics around client readiness. In other words, was the delay on our side or their side? And are there other patterns we can do something about?”

***“As people get experience using Suralink, there’s been good organic growth. We’ve had nothing but positive feedback from the team.”***

**DARRYL HUMPHREY, PH.D., PMP**  
Advisor of Assurance Innovation, MNP



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**THE RESULTS:**  
TIME SAVINGS, HAPPY  
EMPLOYEES, CLIENT  
SATISFACTION,  
COLLABORATIVE  
WORKFLOW

Now, well into MNP's second calendar year using Suralink, it's being used in 11 different audit niches in the firm.

- **Time Savings.** Before using Suralink, an audit team might spend hours in a meeting managing the PBC list. On a large audit, that can be several hundred hours across the team. On small audits, they save roughly 21% of the time.
- **Happy Employees.** Employees also appreciate that Suralink eliminated laborious document tracking. "When you take something like that off their desks, they're happy about it," Humphrey said.
- **Client Satisfaction.** The end clients are happy, too, because they know where everything is. "Clients have the same issue as the firm," Humphrey said. "They have several employees working on the audit and documents all over the place. With Suralink, they can go into a central dashboard and see exactly what's needed and where it is. That's powerful."

- **Collaborative Workflow.** Suralink is also valuable for collaborating with clients and third parties in other countries, where people might be communicating across an 11-hour time difference. "In those situations, it's difficult to do real-time, face-to-face communication. Suralink definitely keeps the workflow moving," Humphrey said.

***"Employees gave Suralink an overall satisfaction rating of 89% in the internal survey."***

**DARRYL HUMPHREY, PH.D., PMP**  
Advisor of Assurance Innovation, MNP



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*At the end of 2021, MNP surveyed employees about their experience using Suralink and found that on large audits, time spent managing the PBC list was cut in half.*

**DARRYL HUMPHREY, PH.D., PMP**  
Advisor of Assurance Innovation, MNP

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## THE CONCLUSION: SURALINK—A SMART DECISION

While MNP has the expertise and resources to build an internal PBC request list management solution, it was a deliberate decision to buy rather than build.

“When you find a tool that does what you need it to do, it’s almost always cheaper in the long run to license that tool,” Humphrey said. “Suralink has the logic in place to manage many to many communications and access control. Building all of that is complicated. It would take a really good team several years to build something like that.”

*“The Suralink team is very knowledgeable about their tool and the problem they solve. That’s good for us as a client.”*

**DARRYL HUMPHREY, PH.D., PMP**  
Advisor of Assurance Innovation, MNP





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

## **CONTACT US**

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