



 **elliott davis**

 **suralink**

CASE STUDY

# Streamlining and Simplifying the Tax Documentation Collection Process



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## THE COMPANY:

MAKING A POSITIVE IMPACT  
ON ITS CLIENTS, PEOPLE, AND  
COMMUNITIES, AND CREATING  
FORWARD-THINKING SOLUTIONS

Elliott Davis is a team of nearly 750 trusted advisors based in Greenville, South Carolina, with nine offices throughout the Southeast. Elliott Davis offers a wide range of accounting, tax, assurance, and consulting solutions. The firm takes a dynamic approach to serving its clients—combining deep technical knowledge with applied forward-thinking experience.

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**THE CHALLENGE:**  
OVERCOMING  
INEFFICIENCIES TO  
PROVIDE A BETTER  
CLIENT EXPERIENCE

In 2017, the Elliott Davis tax team was using a combination of spreadsheets, email, and a portal to exchange documents during their clients' tax engagements. This combination, however, presented the team with three major problems.

First, the team was struggling with the portal that was included in another software solution they were using. It didn't have any organizational capabilities—and the team had to spend extra time searching through files clients provided and organizing them. The firm's clients were also unhappy with the experience it provided because it was unreliable and difficult to use.

Secondly, the team was using Excel to create request lists and then sending them through email. After they would send the request list out, clients would come back and say things like, "We already sent that," or "You didn't ask me for that." "This was a huge source of frustration for

**"We spent so much time figuring out what we had or didn't have and trying to figure out what we still needed and digging through emails."**

us," said Jennifer Powers, Senior Tax Manager at Elliott Davis. "We spent so much time figuring out what we had or didn't have and trying to figure out what we still needed and digging through emails." The team wanted more clarity and visibility into the entire process.

Finally, the tax team wanted to create a consistent experience for clients to provide documents across the firm. Often, the audit team would have been given a document from the client, and the tax team would re-request that same document, not knowing it had already been provided.



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## THE SOLUTION: SURALINK'S AUTOMATED APPROVAL WORKFLOW

When the tax team at Elliott Davis heard from the assurance team that they had implemented a new document exchange and approval workflow software, the tax team was eager to try it out. Over the course of the next few months, the tax team tested Suralink on a number of clients who were the least pleased with the current process and struggled to keep track of documentation. After the success with the initial set of clients, the tax team decided to roll out Suralink to a larger number of tax preparers.





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Before Suralink, managing documents was time wasted. It was necessary time wasted because we needed to know where we were at, but it was inefficient. With Suralink, we're now using that time more efficiently. For example, our preparers are doing something in 10 minutes that used to take 30 minutes or more.

**Jennifer Powers**

Senior Tax Manager

Elliott Davis

## THE RESULTS: MOVING FROM BUSY-NESS TO EFFICIENCY

Suralink was able to provide a solution for each of the Elliott Davis tax team's main concerns.

- **An organized, reliable PBC solution.** The tax team at Elliott Davis has been pleased with the organization and reliability Suralink provides. "Rather than just getting a folder with dozens of documents in it, like in our old portal, we now have each engagement broken down by requests. It's very clear who owns what and when it's due," says Powers.
- **Greater efficiency and transparency.** "It just saves us so much time," says Powers. "We no longer have to dig through emails to find documents. We can simply create a request list, send it, accept or decline requests, and put deadlines on them. It's very obvious to us and the client where each request stands."
- **A consistent experience firm-wide.** Elliott Davis, like many other firms, prepares both audit and tax engagements for their larger clients. Before Suralink, the tax team would often hear from clients, "Oh, I already provided that to the assurance team." Now both teams can see what documentation has been provided on either side, eliminating the need to request the same item multiple times.

But Suralink was also able to provide benefits beyond the team's initial expectations—especially during busy season—including:

- **Saving time:** Creating templates for one engagement and reusing them across the team and across engagements
- **Increasing realization:** Having concrete proof of when there are delays in engagements, allowing the firm to charge for overages
- **Creating accountability:** Ensuring client accountability to deadlines through clear and simple timelines
- **Reducing back and forth:** Understanding exactly when documents were (or were not) delivered through individual request fulfillment, ensures the team doesn't spend time emailing about the status of information
- **Simplifying report delivery:** Allowing team members to securely send sensitive tax returns within a single system
- **Feeling secure:** Knowing client information is secure, instead of worrying about it via email

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## THE CONCLUSION: SAVING TIME AND PROVIDING A BETTER CLIENT EXPERIENCE

The tax team at Elliott Davis believes the biggest benefit of Suralink is the time savings—whether that’s saving time getting an engagement set up, saving time by eliminating the email chain back and forth, or saving time by keeping documents and engagements organized.

And that’s Powers’s message to other tax teams: “You might have team members who say, ‘We don’t have as many needs or the same complexity as assurance.’ That doesn’t really matter. Suralink isn’t overwhelming. You can keep it simple and still experience the great benefits and time savings. And it allows you to provide a great experience to your client by using the same software for their tax engagement they’re already comfortable with from their audit. There really isn’t any reason not to use it.”

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What people don’t realize about Suralink from a tax perspective is that you don’t have to have a request list of 50 items for it to make sense. Even if you only have 10 items, using Suralink is still easier and more efficient than using email. Not to mention how much peace of mind you get from always knowing exactly where each request stands.

**Jennifer Powers**

Senior Tax Manager  
Elliott Davis



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.

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