WK | suralink

Providing clients a secure solution for their sensitive information

THE COMPANY: A RICH TRADITION OF PROVIDING EXEMPLARY CLIENT SERVICES

Williams-Keepers LLC has a rich tradition of providing exemplary client services to clients located throughout Missouri and the surrounding region. In 2018, the firm was named to Inside Public Accounting as one of the Top 300 public accounting firms in the United States. Since its formation in 1923, WK has grown to include office locations in Columbia and Jefferson City and become one of the largest independently owned firms in the state of Missouri.

With 14 members, more than 50 Certified Public Accountants (CPAs) and nearly 100 total associates, the firm offers a variety of audit, assurance, accounting, tax and business consulting services to individuals and businesses that represent a variety of industries.

THE CHALLENGE:
PROVIDING AN
EFFICIENT AND
SECURE PORTAL

Williams-Keepers represents businesses and individuals from a number of industries. Because of this, they handle a variety of sensitive data—from healthcare records to employee benefits and PII to banking information. The firm was also struggling with the sheer number of documents required for an audit, in many cases more than 150 documents.

At the time, WK was using a Microsoft Word document and a document exchange portal to manage PBC lists. This came with its own set of challenges. Because clients were required to use several different systems, it was often easier to just email auditors the files.

"Clients would email us files or give us a flash drive," says Ashley Fangmann, Audit Manager at Williams-Keepers. "We wouldn't want clients to send sensitive information through email, but it happened."

In the current system, every auditor would figure out what worked for them and use that process.

"We wouldn't want clients to send sensitive information through email, but it happened."

THE SOLUTION: SURALINK'S SECURE, INTEGRATED PBC PORTAL

"While the current system did work, it was inconsistent and inefficient," says Fangmann. Fangmann began looking at alternative solutions when she attended a conference in 2018. "We had heard of Suralink several times at the conference. Everyone we talked to loved it and recommended we take a look."

After an initial demo, WK decided to move forward with Suralink. While there are other options on the market that were even cheaper, Fangmann and WK liked the user-friendly interface, advanced features, and airtight security made Suralink an easy sell with the partners. "The communication and tracking just made it so much more attractive and easy for our clients and for us," says Fangmann.

After deciding to sign up with Suralink, WK began the implementation process. Fangmann put together a 30-minute high-level demo to walk through the navigation and Suralink provided a 45-minute training video. "It was really easy," says Fangmann. "Everyone was able to start creating files right away and it wasn't painful at all." Since the initial implementation, if the WK team has questions, they go directly to the live chat. "The

live chat is really helpful. I'm the point of contact for questions about Suralink and I don't have to really deal with anything."

"We actually obtain your SOC2 report every year and review it for any exceptions," says Fangmann. "That brings a lot of comfort around data security. I also use it as a selling point for clients: 'we're using this secure platform, not just a random website.'"

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Ashley Fangmann

Audit Manager

Williams-Keepers

THE RESULTS: CLIENT SECURITY AND FIRM-WIDE EFFICIENCY

Suralink has also benefited WK in four key ways: client satisfaction, overall communication, management visibility, and of course, security.

Client Satisfaction

Initially, there were a few clients—mostly those resistant to change—who didn't want to adopt a new technology. "However," says Fangmann, "All of our clients have slowly converted and now they love it."

Overall communication

Suralink has also improved the overall communication process around audits. WK would find situations where the client would send the document to the in-charge, but the staff would also need it and end up re-requesting it. Clients would, understandably, get frustrated. Suralink has solved this challenge by getting everyone on the same page, as well as having the original files available for the reviewer.

"I'm an audit manager," says Fangmann. "With Suralink, when I go back and review support, I can pull up the original file easily. Having everything in one place has been helpful and has made our teams much more efficient."

Management visibility

With the overall trend toward remote work, Suralink has given WK's management team visibility into each engagement. In-charges can now see what team is working on, what they're downloading, and which requests they've accepted.

Security

With data security as a main focus, WK has enjoyed the peace of mind Suralink's secure portal provides. "We actually obtain your SOC2 report every year and review it for any exceptions," says Fangmann. "That brings a lot of comfort around data security. I also use it as a selling point for clients: 'we're using this secure platform, not just a random website.'"

THE CONCLUSION:

SIMPLIFYING AUDIT

MANAGEMENT FIRM-WIDE

For Fangmann and the WK team, the investment in Suralink comes down to security and efficiency. "Suralink has increased efficiency for us by 3-7% per audit … and that's just on the firm side," says Fangmann. "We've cut down on multiple requests but it's also helpful for our clients because they're no longer wasting time preparing documents we don't need."

"Ultimately, it's been a really easy sell for our firm because of how well it optimizes the process of getting documentation from our clients. It has just simplified the management of the audit overall."

"Suralink has increased efficiency for us by 3-7% per audit … and that's just on the firm side,"

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

CONTACT US

sales@suralink.com

801.203.0002