



Improving the Employee Experience with Suralink

THE COMPANY:

TOP 200 FIRM & GROWING

YHB CPAs & Consultants is a Top 200 firm and one of the fastest growing firms in the United States headquartered in Virginia. The firm offers assurance, tax, and consulting services and employs more than 300 professionals across 11 locations.



THE CHALLENGE:
THIRD-PARTY TOOL
NOT OPTIMIZED FOR
AUDIT WORKFLOW

Over the past few decades, YHB has used various methods for sending PBC request lists and collecting client documents. In the past, clients provided paper copies; some emailed documents before data security became a primary concern. Occasionally, the firm would set up an FTP site for specific clients to transfer files securely.

For the past decade, however, YHB used a third-party document-sharing tool to send and receive documents securely. While clients and employees found that tool easy to use, client folders also tended to become unorganized if the team and their clients didn't follow uniform naming conventions and folder organizational structures.



Drew Throckmorton, CPA and Audit Principal at YHB, says they tried using the tool's workflow management to create standardized workflows. However, the solution was more geared toward project management than audits.

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

Throckmorton calls the COVID-19 pandemic the “not-so-gentle push” the firm and its clients needed to find a better way.

In the Fall of 2021, YHB implemented Suralink.

“The pandemic forced people who liked paper and didn’t see the need to change to do things a different way,” Throckmorton said. “They found out it wasn’t so bad.”

Now in their second busy season with Suralink, **around 90% of their audit and review engagements rely on Suralink** for automating the request list and document workflow process. Their tax, consulting, and advisory teams are also starting to use Suralink.

“Other groups are intrigued by it, so we expect to grow our usage in other service lines,” Throckmorton said.

Client adoption has been strong, as well.

“We haven’t had any complaints from clients that regularly use it. We have a wide variety of scenarios for how clients provide information, but if they ask for advice on how to set things up, I recommend Presidents, CFOs, and Audit Directors be part of the Suralink user team. Not because I want them uploading documents, but so they can get in there and see what’s outstanding.”

DREW THROCKMORTON
CPA and Audit Principal, YHB

THE RESULTS: TIME SAVING EQUALS HAPPY EMPLOYEES

While YHB doesn't have exact numbers on how much time the firm has saved using Suralink, Throckmorton said it's significant.

That time savings has allowed YHB's team members to enjoy a better quality of life. "It's allowed our team to be more efficient and grow with fewer hours per FTE," Throckmorton said.

Matthew Smith, CPA, CCIFP, Principal and Audit Service Line Leader at YHB, credits Suralink—at least in part—for improving the team's work/life balance and YHB's low turnover rate, which is below the industry average.

That commitment to leveraging technology to improve employee lives even helped YHB bring back a former manager that had left the firm to work in industry.

Around five years ago, this manager left the firm because he was considering starting a family and couldn't see how he would balance the public accounting workload, traveling for audit engagements, and family life.

YHB was able to re-recruit a manager who'd left public accounting—something that is almost unheard of—because **technology allows them to offer greater flexibility and more reasonable hours.** Throckmorton said, "Without Suralink, I'm not sure I could have told him enough had changed."



THE CONCLUSION: SURALINK EMPOWERS EMPLOYEES

With YHB's successful implementation of Suralink, their employee experience improved, and their productivity has risen dramatically. Creating a better work/life balance for employees doesn't have to involve firing profitable clients or automating work to the point of becoming disconnected from those clients.

By empowering employees with the right tools and resources, firms can put their people first, keep clients happy, and grow.

“The profession is changing, and so are the expectations we set with clients.

We're not asking our employees to meet unreasonable deadlines, and Suralink provides an audit trail to show why. When your team sees you using this tool to help clients stay on track, they feel like you care about their betterment. There's more benefit from leaning into these tools than simply tracking client documents.”

DREW THROCKMORTON
CPA and Audit Principal, YHB



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

sales@suralink.com
801.203.0002

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