



Case Study

THE COMPANY:

60-YEAR INDUSTRY GIANT

Founded in 1962, Aronson has since become a top 100 CPA firm, expanded its service offerings, and deepened its industry specialties to better serve the needs of its clients, people, and community. In recent years, the firm has also expanded its national and international footprint, providing a comprehensive platform of assurance, tax, and consulting solutions to today's most active industry sectors and successful individuals. Since January 2023, Aronson LLC has been part of Aprio LLP, a premier CPA and business advisory firm, headquartered in Atlanta, Georgia.

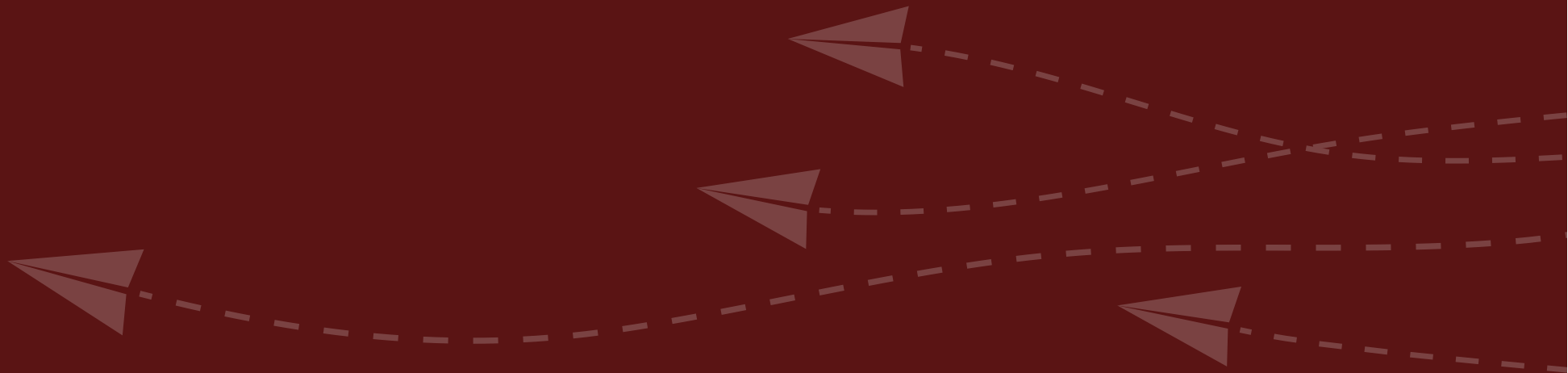


THE CHALLENGE:

SMALL-SCALE FILE SHARING

When Azunna Anyanwu, Chief Technology Officer at Aronson LLC, started with the firm in 2019, Aronson was using Sharefile for sharing documents with clients.

While that solution worked well for exchanging one or two documents, it wasn't tailored to the assurance process.



THE SOLUTION: SECURE FILE SHARING WITH SURALINK

When an employee who had used Suralink in a previous role joined the firm and recommended it, Anyanwu decided to look into Suralink as well as some other comparable solutions.

While Anyanwu performed his own analysis of the solution, the final decision was left to a cross-sectional committee of tax and audit team members—an approach that is central to how Anyanwu operates.

“IT can choose a platform on the backend, but if the front part of the business doesn’t like it, you’re going to have an uphill battle with adoption,” Anyanwu says. “Massive implementation projects fail if you don’t have shareholder buy-in.”

After evaluating several potential solutions, the team chose Suralink.



“The auditors loved it! Suralink felt like it was more polished, had a better user experience, and made it easy to get clients on board. Plus, they provide support if clients need help with the platform.”

AZUNNA ANYANWU

Chief Technology Officer, Aronson LLC

THE RESULTS:

ALL-IN-ONE PLAT- FORM, TIME SAVINGS, SECURE FILE MANAGEMENT

Initially, Aronson rolled out Suralink only to the audit department, but the firm's tax department started using Suralink within the year.

- **All-in-one platform.** "Suralink is our only supported platform for clients that need to share files with us. Some of my guiding principles are simplicity, cloud-first, security, and avoiding duplicate tools," Anyanwu says. "So I made the call that we would not support both Sharefile and Suralink." Now, employees and clients both appreciate how easy it is to collaborate on the Suralink platform.
- **Time savings.** While Aronson doesn't track metrics specifically around how much time they've saved by switching to Suralink, Anyanwu does track usage of the platform. They currently have 2,300 of their approximately 10,000 active clients on the platform, and around 90% use it weekly, if not daily.

- **Secure file management.** Besides improved security, simplicity, and collaboration, the firm has also benefited from having less data stored on its local network. Before implementing Suralink, people had to download files from Sharefile to the network, then upload those same files to CCH Axcess, Caseware, or another cloud-based system. Now, with Suralink's drag and drop functionality, people do a lot less downloading.

"That's important because it means we don't need to worry about maintaining those files, backups, ransomware, etc.," Anyanwu says.



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Before, we might ask a client to send a K-1, and they'd send the wrong file. We'd email to ask them to send the right file. The client is confused, and now we need to get on a call. But Suralink's statuses and comments give you context. It cuts down on emails, instant messages, and follow-up calls.

AZUNNA ANYANWU

Chief Technology Officer, Aronson LLC

THE CONCLUSION: SURALINK—A BIG WIN IN FILE SHARING

Anyanwu says he initially thought there would be clear segmentation between users of Suralink departments that didn't need it. But the Aronson team quickly realized the benefits of sharing files securely, having an audit trail, and collaborating outside of their email inbox.

"Our tax department even came up with an electronic organizer format in Suralink. It's a lot better than having a bunch of documents dumped in a folder," Anyanwu says. "Because of the flexibility of the Suralink platform, we were able to give access to everyone in the firm while improving security."

What's more, the firm has won new business, in part, due to its move to Suralink.

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Before we moved away from Sharefile, we lost a proposal because we were using Sharefile. However, the client ran into issues with their other firm, and they were back six months later. By that time, we'd moved to Suralink. The client was excited and we ended up winning the work.”

AZUNNA ANYANWU

Chief Technology Officer, Aronson LLC

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Suralink is the leader in request list management and approval workflow, helping businesses simplify the document workflow 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 works with more than 850 tax, advisory, and audit accounting clients, as well as legal services, security consulting, financial services, and banking companies worldwide. Its technology, combined with its industry expertise, helps ensure simplicity, transparency, and accountability throughout the document workflow process.

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