



CASE STUDY

Building a True Partnership





THE COMPANY

Creating extraordinary value for clients, people, and the community

With a handful of committed clients, a supply of ledger paper and pencils and an intense desire to succeed, Jim Howard and Joe Smith left a national CPA firm in 1971 to start Smith + Howard. They didn't have a written mission or values statement at the time, but they knew exactly what they wanted to do: develop loyal relationships with their staff and with Atlanta businesses, business owners and families by providing quality CPA services with a level of attention that few seemed to be experiencing.

Now with more than 150 employees, Smith + Howard is a premier provider of a broad range of tax, advisory, accounting and audit services. Rated a Top Work Place in Atlanta (The Atlanta Journal-Constitution), a Top Accounting Firm To Work For in the US (Accounting Today), and a Top Firm for Women (Accounting Today), Smith + Howard is a leader in the industry.





THE CHALLENGE

Consolidating a technology portfolio while pushing boundaries

The IT team at Smith + Howard is one of the most forward-thinking firms in the industry. When Joshua Kirk, Chief Technology Officer, joined the firm in 2017, he wanted to not just maintain, but also push that reputation for innovation forward. One of the first projects Kirk initiated was a technology portfolio review. “We had received feedback from the tax and audit teams about reducing the number of file services we used,” says Kirk.

At the time, Smith + Howard was using several file sharing systems, including Suralink®. However, the challenge was the team needed a solution that would support their large, multinational clients as well as their small clients with individual users. As they looked to consolidate, they also wanted to ensure end users were efficient and clients were happy. Says Kirk, **“We wanted a solution that made it easy for our internal users to obtain and retrieve data.”**



THE SOLUTION

Suralink's integrated request list platform

While searching for the right solution, Smith + Howard did their due diligence. They dug into their existing vendors and also researched full portals. They were looking for a solution that gave them the ability to customize the software for their engagements, that was easy to use, as well as a vendor who would listen to their feedback and use that feedback to make a difference in the product.

“Suralink won out in all of those significant categories,” says Kirk. “Looking at additional investment, it was a win.”

When Smith + Howard did the technology evaluation, the team asked clients and at the time which solutions they liked and disliked. At the time, only the audit department was using Suralink for all its team members. After talking with clients, Smith + Howard made Suralink a firmwide service.

This speaks to our commitment to our clients' feedback than going from a single department to a firmwide service based on client experience. We tripled the number of licenses. We rolled it out to everyone,” says Kirk.

In addition to the client and user experience, Smith + Howard also chose Suralink because of its flexibility and commitment to customer service. For example, Smith + Howard needed a license to manage users, but the IT department isn't using the product to manage the PBC process. “Sometimes it's the small things,” says Kirk. “Suralink was willing to give us a user account to manage users without having to pay for it. It seems like a small thing, but it's actually a big thing. It allows my team to better support people and it has allowed our people to be in the product more and understand it better.”

Additionally, Smith + Howard enjoys the personal relationship they enjoy with the Suralink team. “I know I can reach out to the team and share feedback and share client experiences and concerns and we get honest answers in return,” says Kirk. “Having a company that is so responsive is unusual. Many companies are out to get as big as they can. It's wonderful to work with a company whose focus is providing the best service they can to their clients and knowing that growth will come with that.” Finally, Smith + Howard users find the system easy and intuitive to use. “One of the pieces of feedback I give to vendors is ‘don't make me have to think, just let me do,’” says Kirk. **“A consistent type of feedback I get on Suralink is that our clients and users and staff don't have to think about it. They can just click and go and do what they need to do. They're not fumbling with the tool trying to figure out how to make it work.”**





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Chief Technology Officer, Smith + Howard





THE RESULTS

A better client and user experience

Smith + Howard has benefited from Suralink's simple, elegant user interface. Instead of spending time teaching users how to navigate the product or manually customizing the interface like other products require, the Smith + Howard team is able to **focus on their jobs, not the technology**. "It's hard to put a number to it," says Kirk when asked about the ROI of Suralink. "But a good measure of a product is how intuitive it is. It doesn't help to have an amazing product you have to take hours teaching everyone how to use. The simplest ROI is that the product is simple."





Using Suralink to support remote work

In March 2020, Covid-19 became a huge concern for businesses across the US—for Smith + Howard, it was no different. “We went to fully remote work on March 18,” says Kirk. “Everyone feared it to be a nightmare. But we transitioned to 100% remote work in less than 24 hours with 48 hours notice.” Technology was key in this transition. “The use of cloud products like Suralink helped us make that transition with negligible productivity hit and in some cases, improvements.”

At the beginning, the team at Smith + Howard weren't even sure they would be able to continue audit work remotely. “We thought we might have to stop all audit work,” says Kirk. **“But with Suralink, we have been able to maintain existing clients and even take on new clients.”**





THE CONCLUSION

Suralink provides true partnership

After more than five years with Suralink, Smith + Howard continues to work with Suralink to provide product feedback and push innovation alongside everyday service and support.

“You’re one of the companies where the word ‘partner’ is not just tossed around. It really is a **true partnership**.”

JOSHUA KIRK

Chief Technology Officer, Smith + Howard





The **trusted** platform for trusted professionals

Suralink is the leading client collaboration platform for today's accountants and is dedicated to addressing the Client Readiness Gap. Suralink's secure platform centralizes request and document management, enables workpaper preparation and review, improves visibility and accountability, and ensures teams and clients stay aligned and collaborative throughout engagement progress.

With enterprise-grade security and an easy-to-use interface, Suralink's award-winning client collaboration platform helps firms drive growth, increase profitability, improve customer satisfaction, and mitigate risk.

Suralink's open platform is leveraged by more than 800,000 users worldwide.

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