



Case Study

THE COMPANY:

MICHIGAN'S TOP SMALL BANK

For over a century, ChoiceOne Bank has been committed to its community and dedicated to seeing Michigan grow. Their team of bankers, investors, lenders, and consultants take great pride in serving their neighbors, farmers, and local businesses. Their mission at ChoiceOne Bank is to provide superior service, quality advice, and show utmost respect to everyone they meet. They make this possible by focusing on efficiency amongst their internal teams and processes which allows them to service their clients more effectively.



THE CHALLENGE: UNACCOUNTABLE AND MANUAL RECON- CILIATION PROCESS

Their existing reconciliation process was daunting. Reports were done in individual spreadsheets which not only meant searching for and compiling several documents, it lacked accountability. Being unable to see who completed which reports and when, made the life of Jennifer Pallasch, Accounting Manager at ChoiceOne, difficult. However, the lack of accountability wasn't the only problem. Pallasch would waste countless hours each month tracking down reports, averaging 150 individual reports to account for each month.

*She knew there had to be
a better way...*

*“We had people opening
different excel spreadsheets and
typing in their names and dates.
And sometimes dates weren’t
being filled in. I was unable to
keep people accountable. It was
really inefficient”*

JENNIFER PALLASCH
Accounting Manager, ChoiceOne Bank



THE SOLUTION: SURALINK PBC AUTOMATION & REPORTING

Suralink was a simple solution that gave clarity and organization to the reconciliation process.

The platform is organized by engagements. Each engagement can be assigned to the person responsible for it and shows an overall completion status by percentage. Pallasch utilizes this by creating requests, assigning them out to her team members, and including due dates. “Suralink provided a tracking system that allows me to see dates when reports were completed. It’s really nice being able to give access by engagement to the team members who need it, and remove them once their portion is done. Then I don’t have to worry about reports being edited once they’re good to go.” said Pallasch.



“What’s most important to us is record keeping. With Suralink we can see it was definitely done on this day and we can prove it.”

JENNIFER PALLASCH
Accounting Manager, ChoiceOne Bank

THE RESULTS: EFFICIENCY & ACCOUNTABILITY AMONGST TEAM



Easy Progress Tracking. Not only has the platform supplied the accountability their previous process lacked, having the capability to compile all reports in one place, and monitor progress has realized exponential benefits for the ChoiceOne team, extending all the way to the executive level. The CFO enjoys having a birds-eye view feature that permits him to quickly prepare for board meetings. Pallasch can also use this facet to send out a progress report with the click of a button. **This empowers the whole team to check in with each other and provide updates.**

Time Saving. Suralink's platform has saved the accounting team countless hours, and increased their efficiency ten fold. While the platform has historically been used primarily by accounting firms in PBC process, the ChoiceOne team proved that Suralink's platform can provide great benefits to a broad spectrum of industries, including banking.

“

It's been hugely successful. I hate to even think about the way we used to operate this part of our duties every month. Every month that goes by we find more things it can be used for.”

JENNIFER PALLASCH

Accounting Manager, ChoiceOne Bank



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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