



 suralink

  
ROTH FIRM

# Case Study

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## **THE COMPANY:** EXPERIENCED BUSINESS & TRANSACTIONAL ATTORNEYS

Roth Firm is home to a group of highly skilled and experienced business and transactional attorneys. A highly respected regional law firm with offices in Cleveland, Ohio, and Louisville, Kentucky, they represent individuals and domestic and international companies in various industries, including but not limited to the medical and manufacturing sectors. They pride themselves on being true business partners to their clients.



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## THE CHALLENGE: HARD-TO-TRACK PROGRESS

The firm primarily focuses on mergers and acquisitions which can have various components like real estate, employment law, intellectual property, etc. The Roth team is trained to handle the entire scope of the transaction which means the need to stay organized, and having the team and clients on the same page throughout the process is critical.

Their existing process of working with a combination of email, phone calls, and written and digital note-taking worked, but **it lacked the ability to track the process and provide accountability**. It also caused unnecessary back and forth with clients. Lastly, the firm needed a way to service its clients remotely as the pandemic started to impact face-to-face interactions.

*“The process can become disjointed quickly if you don’t have a good way to manage the due diligence process”*

**STEVEN ROTH**  
Principal & Founder





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**THE DISCOVERY:**  
SURALINK—AN  
INTUITIVE & SIMPLE  
PROCESS

**The firm's goal** was simple, to find a way to organize the due diligence and document gathering process so all parties know what is required, when documentation is due, and the progress being made.

Steven Roth previously worked at large law firms and had exposure to multiple tools like Citrix Sharefile, Dropbox, and others in the market, but decided to take a fresh look when he started his own firm.

Coming across Suralink was fortuitous as his brother Jordan Roth, who also works at the firm on the accounting side, previously used Suralink at Elliot Davis. Because of Jordan's previous positive experience with Suralink, and how easy it was to transfer documents through a simple and intuitive user interface, Jordan felt it could be a great fit for the law firm.



*“We looked into a bunch of options, but the cost didn’t make sense. We didn’t need the extra thrills like billing, invoicing, etc. A lot of the solutions had overlapping options. Suralink is one of the few that stays in a consistent lane, which I like”*

**STEVEN ROTH**  
Principal & Founder

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## PURCHASE & IMPLEMENTATION:

Steven reached out and quickly scheduled a demo to see the product. “The demo was great and concise, all of my questions were answered, but most importantly the product was intuitive and self-explanatory which made implementation simple.”

**Upon purchasing the software, the firm instantly made it part of their kickoff call with clients.**

*“We set the tone with the client in terms of the documents and information we’ll need. We provide them with a brief overview of Suralink and start working. Clients have had a positive reaction to Suralink, because it allows them to see outstanding items and gain insight into the overall progress.”*

**STEVEN ROTH**  
Principal & Founder



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## THE RESULTS: EFFICIENT BEYOND EXPECTATION

- **Time Saving.** “Suralink has helped dramatically from an organization and efficiency standpoint,” says Roth. Whereas products like Dropbox allow you to drag and drop files, they lack folder hierarchy so you end up having to sort through documents and decide where they go. With Suralink the client can visually see where each file needs to be uploaded, which saves us valuable time.”
- **Client Satisfaction.** Roth Firm has experienced additional benefits as well. “Clients can see the broader picture of where they are in the due diligence process,” says Roth. “It’s a big component and can be burdensome. Clients have the tendency to get antsy since it seems never-ending.”
- **Easy Internal Communication.** Finally, Suralink has made internal communication easier according to Roth: “Instead of asking a colleague for a file, we know to go directly into Suralink to locate it.”







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

## **CONTACT US**

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