



How Suralink's Platform Creates Growth for Every Stakeholder

THE COMPANY: CLIENT RELATIONSHIP SPECIALISTS

Whitley Penn is a leading public accounting and strategic advisory firm that specializes in regulatory compliance, tax strategy optimization, and leveraging technology to streamline processes for its audit, consulting, and tax practices. Its extensive experience and focus on strong client relationships has generated impressive growth.

Whitley Penn has served its clients for over 40 years throughout nine locations across Texas and New Mexico, making it one of the largest accounting firms in its region and 35th overall in the nation, according to [Accounting Today](#).



THE CHALLENGE: STREAMLINING COMMUNICATIONS AND ENGAGEMENT ORGANIZATION

Whitley Penn's dedication to quality engagements has propelled its high growth and customer satisfaction. However, that dedication often meant a gratuitous amount of document-chasing, email thread synchronization, and trying to stay on top of file management, distracting from focusing on the overall engagement itself.

"Before Suralink, we were essentially using Dropbox and sending Excel requests," said Andy Hines, Audit Partner at Whitley Penn. "We had a few clients that approach worked well for, but we found that, especially as we got into busy season, we were constantly juggling emails, documents, and other engagements, while doing everything possible to keep things running smoothly."

"The challenge became, 'what have the clients already given our team? What do we still need?' Because with that spreadsheet and email approach, every team did it differently," Hines continued. "The client might've emailed one professional a document, that professional didn't know that their coworker needed it, and then said coworker took it upon themselves to email the client for a file that had already been sent over."

Needless to say, issues like these are not exclusive to Whitley Penn. Most firms contend with communication and validation issues like these, and they can turn engagements into frustrating experiences for both professionals and clients.



THE SOLUTION: IMPLEMENTING TECH IN TRACKING ENGAGEMENTS

Hines and the Whitley Penn Audit leadership team knew that technology was essential to compete with larger firms while also maintaining its high standards of excellence.

“Technology has always been one of my passions, and I wanted to see how we could use it to make our engagements more efficient. **We saw that Suralink had the easiest user interface out of all the vendors we considered,**” Hines said. **“It was the cleanest and the best when it came to tracking engagements.”**

Many of Whitley Penn’s audit engagements comprise thousands of documents and can run for weeks to months at a time. A lot of document requests, validation requests, and communications come with that sort of interaction by default.



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The value for us in Suralink lies in its collaborative nature, allowing for multiple people to handle numerous requests and documents seamlessly. Everything is organized in one centralized, transparent, and efficient tool. Our clients aren't sending files multiple times, and our teams are able to validate them and say, 'Yes, this is done, I'm good with this,' all without pinging the client or their coworkers again.

ANDY HINES

Audit Partner, Whitley Penn

THE RESULT: EVERYTHING IS SIMPLE & SECURE

This journey of expediting and consolidating processes has had a profound impact on Whitley Penn's audit practice and its clients. Whereas professionals and customers previously had to contend with staying on top of countless one-on-one communications, file management, etc., Suralink's solution offered a way to centralize every element of an interaction. The result has been countless documents streamlined, much time saved, and a meaningfully improved experience for both Whitley Penn's audit professionals and the clients they work so hard to serve.

"Everything is very simple," Hines elaborated. "Everyone can see what was submitted or validated on which day, which holdups may be happening, and when everything is due. And all stakeholders can communicate those things to each other directly, right in the platform."

Hines and his Partners are also pleased that Suralink's platform is SOC 2 compliant, keeping its data secure, and how it has kept pace with an increasing workload. As previously mentioned, Whitley Penn is a high growth firm, and Hines needed to ensure that any software he found could effortlessly scale with exponentially larger, more complex workloads, and maintain security measures required by its industry.

"That was my question; would the technology keep pace with our growth and requirements? So far, Suralink has done an excellent job scaling with our volume!" Hines said.





THE CONCLUSION: STREAMLINED ENGAGEMENTS & CLIENT & EMPLOYEE SATISFACTION

Ultimately, Suralink is providing a means for Whitley Penn to further elevate experiences while also enabling growth.

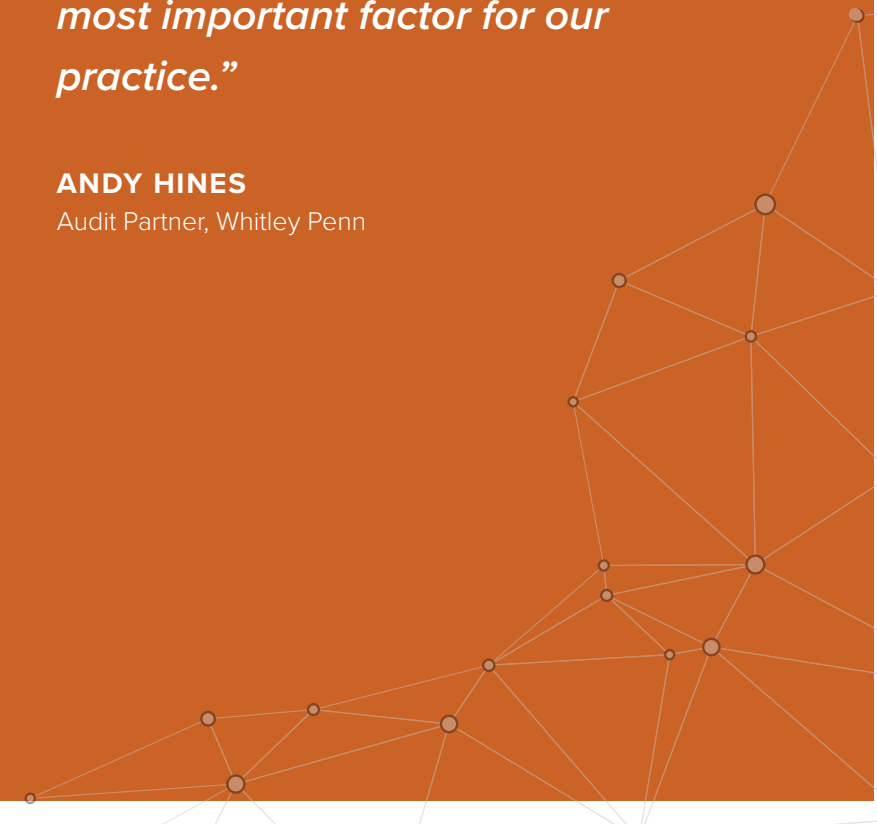
“What’s the ‘right’ size for an audit book of business?” Hines asked. “At what point do you have to add more Partners to handle an increasing workload?” With Suralink, Hines said, technology reduces overall time spent on tedious tasks, enabling the team to take on more purposeful work.

“**That makes Suralink a pivotal player in our tech stack,**” he added. The ability to scale with and support firm growth is what makes Suralink’s platform so powerful, and Hines doesn’t see that benefit diminishing for Whitley Penn’s Audit team anytime soon.

“If I were to tell our audit team tomorrow that we’re not going to use Suralink anymore, there would be an uproar. Ultimately, that level of employee and client satisfaction is affirmation we’ve chosen the right tool, and the most important factor for our practice.”

ANDY HINES

Audit Partner, Whitley Penn





Suralink provides professional services firms with a single, secure platform to collaborate with clients, exchange documents at scale, and track the progress of engagements.

With enterprise-grade security and an easy-to-use interface, Suralink's award-winning client interaction portal helps firms increase efficiency and improve their relationships with their clients.

Suralink's open platform is used by over 600,000 businesses worldwide.

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