HARSHWAL & COMPANY LLP
CERTIFIED PUBLIC ACCOUNTANTS

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CASE STUDY

Streamlining the Tax and Audit Process to Improve the Client Experience

Case Study
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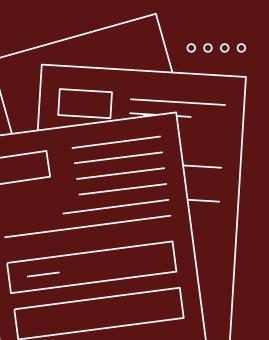
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THE COMPANY: FOCUSED ON THE CLIENT EXPERIENCE FOR MORE THAN 10 YEARS

Harshwal & Company HCLLP has been a leader in auditing, accounting, tax, and IT services since 2009. Headquartered in San Diego, California, Harshwal & Company specializes in serving Native American governments, tribal enterprises, NAHASDA housing authorities, state and local governments, BIE schools, not-for-profit organizations, FQHC clinics, and federal departments across the US.

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THE CHALLENGE:

MANUALLY TRACKING
AND MANAGING
DOCUMENT
REQUESTS

Like most accounting firms, Harshwal & Company relies on repeat business as a critical piece of its business model and is, therefore, dedicated to—and has a long track record of—providing a superior client experience.

However, in 2017, the firm began to notice a trend: Clients were unhappy with the document request process. Specifically, clients were unhappy with the current file sharing software solution. It failed to provide visibility into the document collection process and clients were having to constantly work in and out of spreadsheets and emails, manually combing through every request to track the status.

"We were getting too many duplicate document requests and clients were getting frustrated," says Garima Pathak, Operations Manager at Harshwal & Company. "Our accountants were frustrated as well, because it was so difficult to upload and download documents and almost impossible to trace the documents that client provided."

Clients were also frustrated by the complexity of the interface—it was cluttered and not intuitive. Finally, both clients and Harshwal team members struggled with access across the board. Harshwal's software at the time required users to create multiple accounts and download the software to their computers, which made it difficult and time-consuming to get started. And it was virtually impossible to grant users access to the permissions they needed. During the audit process, sensitive documents were being shared that not all team members or clients should have access to.

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THE SOLUTION:

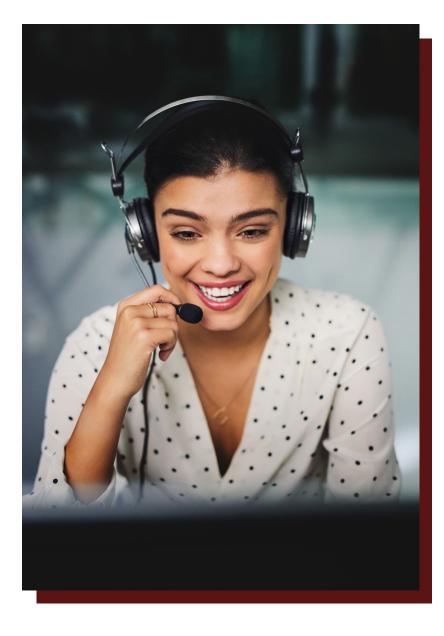CHOOSING SURALINK'S CUSTOMIZABLE, SECURE PLATFORM

With its focus on a differentiated customer experience, Harshwal & Company decided it needed to evaluation a new document request solution.

"We got to know Suralink from a colleague," says Pathak. "We had one demo and knew, 'Yeah, we need this.'" Harshwal & Company first implemented Suralink with its audit team. Initially concerned about setup time and how transitioning to a new tool would affect client satisfaction, the Harshwal & Company team ended up being pleased with the implementation process.

"It was a very easy and quick implementation. We got help from the Suralink team, and we did the online tutorials," says Pathak. "If we had a question during implementation, or if we ever have one now, Suralink's customer care is very helpful. They come back with the answer the same day and answer all my questions. They're just very prompt."

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Garima Pathak

Operations Manager

Harshwal & Company

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THE RESULTS:

SAVING TIME
AND MONEY
AND IMPROVING
SECURITY

From the beginning, the team at Harshwal & Company liked the customizability of Suralink. From customizing engagements and requests to giving custom access to individual clients and team members, Suralink has been the answer to the issues Harshwal & Company was experiencing.

"With Suralink, when the client uploads a document, we can see it immediately," says Pathak. "Now we don't have to request the same document two or three times. It's just very simple."

Harshwal & Company clients and team members also enjoy the cloud-based nature of the Suralink application. As a SaaS application, Suralink doesn't require users to download the application, meaning they can get started immediately and access their documents from anywhere.

The Harshwal & Company team has seen so much value from Suralink, the firm has made it part of its client onboarding process.

"We tell all our clients about Suralink," says Pathak. "At the beginning of a relationship with a client, we give a presentation about our firm. We specifically tell them we use this technology, then we give them a demo. The features are easy to understand and the whole thing makes clients very happy knowing we have solved this process."

Harshwal & Company has also seen results in other parts of its business. Suralink has saved the team time on audit requests. It has also lowered the fees for the firm, because it spends less time chasing documents.

The results were so obvious, that Harshwal & Company also rolled Suralink out to its tax team. "Tax documents have to be very secure," says Pathak. "And Suralink is by far the safest portal for those documents."

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THE CONCLUSION:

IMPROVING THE CLIENT EXPERIENCE THROUGH A BETTER DOCUMENT REQUEST SOLUTION

At the end of the day, the biggest change for Harshwal & Company since implementing Suralink has been in client satisfaction. "It saves us a lot of time because we're more efficient. And it's very easy to use. We love how secure it is," says Pathak. "But most importantly, our clients are just very happy and love using Suralink."

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

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