

ACCOUNTANTS

Miller Grossbard Advisors, LLP

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PAULINE SULLINGER
Director of T.A.S.C.

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Core Business

Full-service outsourced CFO/Accounting Services, Audits & Assurance, Business Management, Business and IT Consulting

Homebase

Houston, TX

Business Launch

1988

Employees

40

Technology of Choice

SmartVault, QuickBooks, Intacct

Building the Ultimate Firm Tech Stack

Innovative firm anchors cloud-based platform with SmartVault to drive greater efficiency and to advance client service opportunities

Houston-based Miller Grossbard Advisors, LLP (MGA) is a member of the Alliot Group, a worldwide alliance of independent accounting, law, and consulting firms. Given the firm’s affiliation with a large global organization, its philosophy of innovation and its employees’ passionate commitment to providing progressive services to its clients, may be somewhat unexpected. However, as Pauline Sullinger, Director of T.A.S.C. (Technology and Strategic Consulting) at MGA attests to, these components of the firm’s culture are integral to its success as well as being primary drivers of the firm’s growth.

Pauline’s T.A.S.C. business unit itself was borne out of her conviction that technology was going to be her team’s saving grace as they navigated the need to quickly adapt the firm’s workflow and the way that it worked with clients in order to handle the growth of its F.A.S.T. (Finance Accounting Support Team) Team’s services.

The F.A.S.T. division has been headed by Pauline since she joined MGA four years ago, bringing both financial and IT expertise to the firm. Pauline is an MBA who had worked in finance at an IT consulting company that supported large software providers. While having some background knowledge of IT certainly helped her set forth a vision for how creating a firm-specific, integrated platform of technology solutions would create efficiency and a better client experience, Pauline is quick to point out that, “There is no silver bullet or magic pixie dust when it comes to vetting the potential platforms for a firm’s technology stack. I just knew that we needed to have the right tools in place to handle all of the accounting packages that we were selling to our clients along with solutions to manage receipts, data storage and deadlines.”

Given that MGA’s F.A.S.T. unit works primarily with large companies averaging between \$50 and \$100 million in revenue per year, Pauline and her team— which now consists of nine full-time employees and a team of 10 F.A.S.T. support staff in India—needed to find the right technology solutions to support the firm’s current needs and to support their plans to expand T.A.S.C. services even further over the next two years in order to meet the demand for technology and strategic consulting services in their client base.

A solution that everyone can get on board with...

“Once I knew which pieces I needed, I went to work evaluating and testing every potential solution under the sun,” laughed Pauline. “It was during this process that I saw SmartVault, and as soon as I saw what it could do in terms of collaborative workflow

and making it so easy to share files with the simplicity of a secure link, I knew we had to have it for the document management piece of our firm platform. I loved it so much I was willing to fight for it when I went back to our firm's partners with our proposal for implementing the new solutions I had vetted."

Some key reasons why Pauline was adamant that Miller Grossbard choose SmartVault included:

- SmartVault is flexible and scalable with an open API which allows other solutions (like QuickBooks and Intaact) to be integrated with it as the firm expands its tech stack to incorporate other solutions.
- The continuous improvements and enhancements being made to the software—many of them based on user feedback—which Pauline said demonstrated that SmartVault listens and cares for its customers.
- The ability to send secure documents and share links to files with their team in India, thereby bypassing the security "blocks" created by their firm's own IT infrastructure.
- Unlimited data storage—this is especially important for Pauline and her team if they have a client without their own server. They just use SmartVault to circumvent the need for external storage.

Pauline wasn't alone when it came to cementing SmartVault's value for MGA. Along the way to implementation, Pauline worked with SmartVault's account management team to get answers to questions that she or other members of the firm had.

Once the firm made their final decision, Pauline said, "Onboarding was super simple. I was actually going to wait to implement the document management piece of our platform, but the SmartVault team showed me how easy it would be, so we just went for it and made SmartVault the first piece of our cloud-based firm platform."

Pauline says that she has absolutely no regrets about the decision to implement SmartVault, especially because everyone in her firm is actually onboard with using it! "We like SmartVault so much better than what we were using before. In fact, our staff actually avoided using our previous document management solution—they disliked it that much—and now everyone is happily using SmartVault as part of our integrated system."

Although Pauline says that she hasn't yet quantified the return on investment her firm has received since switching to SmartVault, she has no doubt that it has saved all of the firm's users significant amounts of time compared to "the old way" of doing things. In addition, their clients appreciate having an intuitive, secure way to exchange and work collaboratively on files with the firm.

Pauline shared a recent example of how much more efficient SmartVault makes her firm on the client side. "We just performed an engagement for a doctor's group with nineteen doctors. We told them that if we handled their financials, we would push them out with one link to the whole group. Boom! They would all have everything they need."

Final words...

According to Pauline and her T.A.S.C. team, they know that they still have a ways to go in the implementation of the firm platform that they envision for the future. "But I know," Pauline said, "that we have the secure document storage and collaborative workflow portion of it locked down."

As Pauline continues to break new ground in terms of technology solutions for MGA, its expanding client base and to support new client service opportunities, Pauline offers these words of advice to firms that may be considering building their own cloud-based technology infrastructure: "Don't wait!"

As for using SmartVault for the document management segment of a firm's tech stack? Pauline believes that, "It is the right choice for anyone in the accounting field. It's user-friendly and super useful for sharing sensitive data securely. I absolutely recommend it."