

Warren Averett, LLC

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Chris Morrow, chief information officer



Company

Warren Averett, LLC

Industry

Accounting

Location

Headquartered in Birmingham, AL with 12 offices throughout the U.S.

Number of Employees

575

Business Challenges

- Old system virtually unusable
- Clients unhappy with old system
- Needed a way to grant specific permissions for different parties

Business Results

- Significantly improved client collaboration
- Easily set folder level permissions
- Efficient workflow
- Improved client service

How Warren Averett utilizes ShareFile across various departments

As Alabama's largest certified public accounting firm, Warren Averett tailors traditional accounting, auditing and tax services, as well as many other nontraditional services, to meet the unique needs of each client.

Prior to ShareFile, the portal that the firm was using had limitations. “It was all or nothing access. We couldn't assign one user to multiple folders,” says Chris Morrow, chief information officer at Warren Averett. This created a problem for day-to-day operations.

In addition to permission limitations, the firm also experienced issues with client satisfaction. Previous products proved to be difficult to operate for the end user.

The firm now uses ShareFile in its audit and tax departments, as well as for its wealth management, staffing/recruiting and benefit management programs.

During the audit process, clients can upload documents to the portal, which makes it easy to access the necessary information at any point during the audit.

The tax department uses ShareFile when working on various projects with clients. “With previous products there were constant usability issues, which proved to be frustrating for clients. With ShareFile, we have seen a significant increase in client satisfaction, which adds to the value we provide our clients,” says Morrow.