



Beyond File Sharing

A Practical Guide to Choosing Purpose-Built
EFSS for Secure, Scalable Client Work

The New Reality for Professional Services Firms

Professional services firms run on documents—engagement letters, tax returns, contracts, reports, documentation, deal rooms and more. And every one of those files represents client trust and billable time.

Yet many firms still rely on consumer-grade or legacy file-sharing tools that were never designed for high-stakes, document-centric work. They may be fine for personal use or simple internal sharing, but they quickly break down when you introduce strict compliance rules, demanding clients or distributed teams.

This e-book explores why forward-thinking firms are moving away from generic file-sharing tools and toward purpose-built enterprise file sync and share (EFSS) solutions.

You'll learn:

- About the hidden risks and limitations of legacy EFSS and standard file-sharing tools
- How a purpose-built EFSS supports secure, streamlined client work at scale
- What capabilities should be prioritized when evaluating modern EFSS solutions
- How real-world workflows demonstrate the impact of a modern platform in action

What EFSS Really Is. And Why it Matters.

An enterprise file sync and share system provides a central, secure location where users can upload, manage and share files with changes synchronized across devices and users. Instead of relying on email attachments or consumer tools, EFSS gives firms controlled access to documents with features like versioning, access permissions and activity tracking.

Modern EFSS platforms typically go beyond basic storage to offer capabilities such as:

- File synchronization across laptops, tablets and mobile devices
- Collaboration features like commenting and version tracking
- Granular access controls and sharing policies
- Workflow management around document review, approval and signature
- Centralized content management and audit trails

Why Generic File-Sharing Tools Fall Short for Professional Services

Professional service firms face a very different environment today than they did even a few years ago. Remote and hybrid work have become standard, which means more teams collaborating across locations and time zones and more client interactions happening digitally. In parallel, clients expect fast, seamless digital experiences with simple upload links, e-signatures and clear status updates instead of email chains and ad hoc attachments.

Complexity is also increasing. Financial services, accounting, legal, healthcare and other regulated industries must comply with strict data protection and privacy requirements. As a result, the volume of digital documents continues to grow, and firms need ways to keep that content organized, accessible and secure without relying on manual processes.

In this environment, file sharing that's considered "good enough" is not only unacceptable—it could also be detrimental to your business. Firms need an EFSS approach that centralizes content, streamlines collaboration and embeds security and compliance into everyday workflows.

Many legacy EFSS and standard file-sharing tools were designed for simple internal collaboration, like sharing photos, sending a large file or keeping a small team in sync. For professional services firms, that's just the starting point. You're managing confidential information, complex engagements and demanding regulatory requirements. A tool that only syncs and shares files can't keep up with the way you actually work.

Many firms start with standard file-sharing tools such as consumer cloud drives or legacy EFSS platforms.

These tools typically do a few things very well:

- Store files in the cloud
- Sync files across devices
- Enable basic folder organization and link sharing

For low-risk, low-volume work, that might be sufficient. But professional services firms quickly run into limitations:

- **Fragmented workflows:** File sharing is disconnected from client onboarding, project management, reviews and approvals. This leads to tool sprawl and manual handoffs.
- **Limited visibility:** It can be hard to see which client deliverables are outstanding, who

is responsible and what is blocking progress.

- **Security gaps:** Generic tools may provide a baseline level of security but often lack the granular controls and compliance support required in regulated industries.
- **Poor client experience:** Clients receive a mix of email attachments, unsorted links and separate portals, which can feel confusing and unprofessional.

These issues become more pronounced as firms grow. Adding more storage or more seats does not fix the underlying problem: the tools were designed to move files, not to run complex client engagements.

With a standard or legacy system, four critical areas become hazards: end-to-end workflows, scalability, integrations and security and compliance.

Let's dive into each of these in more detail.

1. From Simple Sharing to End-to-End Workflows

To see the difference between standard and purpose-built EFSS, consider what a generic cloud drive offers. You can create folders, upload files and share links. Sometimes you are given basic automations, such as file conversions or auto-sorting. This is helpful for simple collaboration, but it leaves gaps when you try to manage full client lifecycles.

A purpose-built EFSS is designed around those lifecycles, giving firms not just storage and sync, but structured ways to run work:

- **Client and project organization:** Create personal and shared folders and set up dedicated client hubs where contacts, files and related projects live together.
- **Workflow and automation:** Build projects with associated task lists, file requests and comments using prebuilt or custom templates to standardize processes.
- **Collaboration and approvals:** Give clients guided ways to upload documents, provide visual feedback and submit approvals in a single environment.
- **E-signatures and auditability:** Collect signatures from all necessary parties, send automated reminders and maintain complete audit trails.

Without a purpose-built platform, firms often patch this together with multiple tools: one for file sharing, another for project management, another for signatures, another for client communication and so on. This introduces friction, increases the risk of error and makes it harder to enforce consistent processes across teams.

By contrast, a purpose-built EFSS solution centralizes document-based workflows so that file sharing, collaboration and approvals all happen in one place, making your EFSS system a foundation for how work gets done, not just a storage layer.

2. Why ‘One Size Fits All’ Plans Can Stall Firm Growth

With most standard file-sharing tools, “upgrading” means more storage, longer retention and a handful of extra security options. That might help a growing small business, but it doesn’t change how work gets done.

Professional services firms need plans that align with how they truly operate:

- Multiple client engagements running in parallel
- Specialized workflows for tax, audit, advisory, legal or consulting services
- Strict regulatory requirements and audit expectations
- Complex approval chains involving internal staff, clients and third parties

Most standard file-sharing solutions offer tiered plans that increase users’ storage. Rather than simply offering “more space,” purpose-built EFSS solutions will bundle capabilities such as document packaging, file check-in/checkout, integrated client onboarding steps, accounting-specific templates, tax preparation workflows, automated e-signature letters and more.

This lets firms scale up their EFSS environment while keeping their core workflows intact and standardized.

When plans are designed around industry use cases, the platform can grow with the firm, supporting more clients, more engagements and more complex work without requiring a constant reshuffling of tools.



3. Integrations that Support Real-World Professional Services Workflows

Enterprises cannot afford to lose time on manual data transfers between systems. Copying information from a tax solution into a generic file share, then into a CRM and back into email, wastes time and introduces opportunities for human error.

Standard file-sharing tools often integrate with popular general-purpose apps like office suites, generic CRMs and design tools. Unfortunately, they may not reach the specialized systems professional services teams rely on.

A purpose-built EFSS on the other hand is designed to sit at the center of your technology ecosystem. It can connect to:

- Multiple client engagements running in parallel
- Specialized workflows for tax, audit, advisory, legal or consulting services
- Strict regulatory requirements and audit expectations
- Complex approval chains involving internal staff, clients and third parties

These integrations allow files and workflows to move smoothly between systems. For example, documents generated in a financial application can be automatically stored, shared and tracked within the Progress® ShareFile® platform, with signatures and approvals securely captured and logged. When direct connections are unavailable, ShareFile support for integration platforms such as Zapier helps firms automate niche or custom workflows across thousands of applications.

Rather than treating file sharing as an isolated step, firms can embed EFSS into the broader process. They can go from data collection and document generation to client delivery and archiving.



4. Security, Privacy and Compliance that Match the Stakes

For professional services firms, a file share is never “just a link.” It’s often regulated data, client IP or confidential information. Most legacy EFSS and standard file-sharing tools offer baseline security features such as two-factor authentication, permission settings, encryption and file recovery. These are important, but in professional services, they are only the starting point. Firms often handle sensitive financial data, personally identifiable information, health records or other confidential deal documents that fall under strict regulatory regimes.

By contrast, purpose-built EFSS software for professional services firms has security features made for their unique use cases with security matched to regulated workflows:

- Strict password policies
- Password hashing
- Account lockdowns
- Multi-factor authentication
- Remote locking and wiping of encrypted data when devices are lost or stolen
- TLS security protocols and 256-bit encryption for uploads and downloads
- Encrypted file links and messages
- Granular user access related to downloading, editing, copying and distribution
- Security alerts
- Terms and conditions acceptance on the login page
- Native e-signature technology
- AI-powered share setting recommendations to help reduce the risk of human error
- Watermarking, NDA enforcement and deal room readiness
- Virtual Data Room (VDR) to protect sensitive documents and confidential transactions
- Audit trails
- Supporting compliance standards like GDPR, SEC, FINRA, HIPAA and more.
- Datacenters that have security certifications aligned with SOC 2 type 2, ISO 27001 and ISO 27701 frameworks

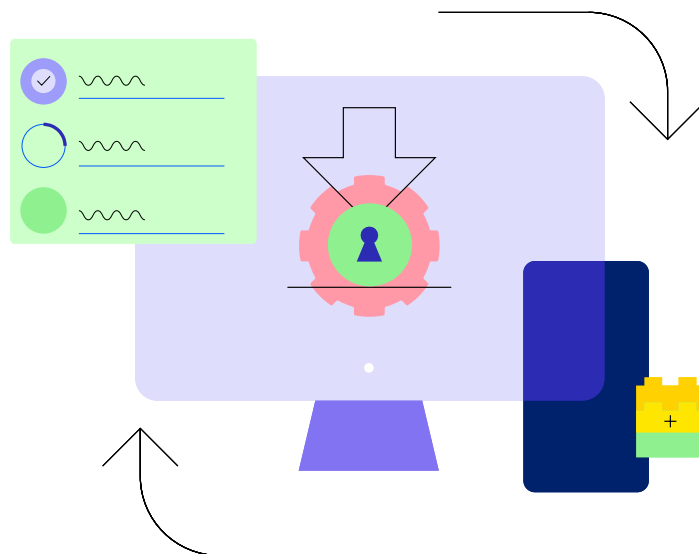
As the importance of file security and compliance continues to grow, many firms are reevaluating their reliance on legacy EFSS. And relying on employees, clients and partners to work from secured devices and networks isn’t going to be enough. You need a file management system built to support strong security, privacy and compliance requirements.

Evaluating a Purpose-Built EFSS for Your Firm

Choosing the right EFSS platform means looking beyond storage and sync. As you evaluate options, consider:

- ✔ **Security and compliance:** Does the platform provide the controls, certifications and audit capabilities your regulators and clients expect?
- ✔ **Workflow and automation:** Can it support the way your firm actually works without heavy customization?
- ✔ **Integration depth:** Does it integrate with both your general-purpose tools and your practice-specific systems?
- ✔ **Client experience:** Can you deliver a consistent, branded and intuitive experience for clients across all engagements?
- ✔ **Scalability and governance:** Is it easy to onboard new staff, enforce policies and roll out standardized templates as your firm grows?

Using these criteria as a checklist can help you distinguish between generic file-sharing tools and platforms that are truly equipped to support professional services work at scale.



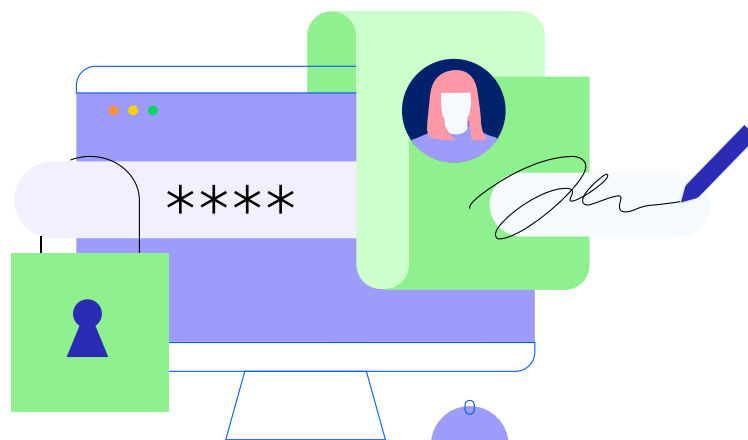
Turning File Sharing Into a Strategic Advantage

Bringing It All Together with ShareFile Software

Generic consumer and even many enterprise file-sharing tools may work for basic collaboration, but professional services firms that manage highly sensitive data and complex client engagements need something more. They need an EFSS solution that centralizes content, connects work from intake to signature, integrates with the systems they already use and provides security and compliance that match the stakes.

With Progress ShareFile software, firms gain access to features tailored for document-centric organizations, plans that reflect professional services workflows, rich integrations across both general-purpose and specialized applications and robust security capabilities built to support regulatory requirements. Together, these capabilities help firms enhance file-related productivity, reduce risk and deliver a smoother client experience.

Your documents are at the center of your business. It is time to give them a platform designed for the way you actually work.



About Progress ShareFile Software

Secure, All-in-One Collaboration for Outstanding Client Experience

Today's clients expect more than just good service. They want a modern, easy and secure experience. As the world becomes more digital-first, both accounting and legal firms need tools that help them work smarter while delivering the high-quality interactions clients now demand.

ShareFile software is built to do exactly that, with an all-in-one platform that brings file sharing, client collaboration and workflow automation together in one place without adding complexity or compromising security.

Client processes like onboarding are faster and easier, so teams can deliver work more efficiently and spend more time on higher-value tasks. Automated document requests, approvals and e-signatures help streamline processes and improve turnaround times.

ShareFile features also fit right with the tools you already use, like Microsoft 365 and other business applications, making it easy to adopt without disrupting how you work.

The result? Better experiences for clients, smoother workflows for teams and the confidence that your data stays protected every step of the way.








To learn more about how to modernize your client experience with ShareFile software, visit our site.

About Progress Software

[Progress Software](#) (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and personalized digital experiences with agility and ease. Businesses of all sizes get a trusted provider in Progress, with the products, expertise and vision they need to turn AI disruption into a competitive advantage. Millions of developers and technologists at hundreds of thousands of organizations depend on Progress every day. Learn more at www.progress.com

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