

A background photograph of a modern office environment. In the foreground, a woman with long dark hair and red-rimmed glasses sits at a desk, looking at a laptop. A man in a light grey sweater leans over her shoulder, pointing at the screen. In the background, another woman with red hair is seated at a desk, and a man in a dark suit is leaning over her, looking at a document. The office has large windows, modern lighting, and a professional atmosphere.

*Five Ways* The Right  
Document Request and  
Tracking Solution Can  
Simplify Audits





# Take Control of Document Sprawl

Let's say each of your consultants is working on three to five engagements at a time. And each engagement requires a minimum of 100 documents to be shared between your consultants and their clients. For a single consultant, that's at least 300 documents to keep track of. Now multiply that by the dozens of consultants in your business and it's easy to see that document sprawl is already out of control.

“Suralink is a happy medium between what we were doing manually and a GRC solution that would be too cumbersome and a lot more effort, not to mention a lot more expensive.”

—MARC PUNZIRUDU

VP CONSULTING SECURITY SERVICES, CONTROLSCAN

# Document Sharing Is *Out*. Document Management Is *In*.

Finding a software solution for document sprawl in the past meant uploading documents to a series of folders. But being able to access documents isn't enough. You must be able to access them securely and restrict access. You must be able to accept requests that have been fulfilled properly and send back requests that aren't complete; receive instant notifications of any new activity in the system; and communicate with the client about each individual request.

Clearly, a document sharing solution that's just a series of folders won't cut it. That's why Suralink's document management and tracking software is the perfect solution to today's paperwork proliferation.

If each consultant requests just five documents per week per client, that's more than 1,300 documents exchanged per year!

# 1

## *Get a jumpstart on new engagements*

**MANY AUDITS** have similar, if not exactly the same, requirements. Starting from scratch on engagement is a waste of time ... not to mention frustrating. What MSSPs need is a good way to roll engagements over from client to client or project to project.

A good document management solution will allow you to create templates, copy engagements, or roll them over so you're ready for the next engagement before it even begins. Imagine the time you could save if, when starting an engagement, your document requests were ready—not just getting started.

### **SURALINK STANDOUT**

#### **FEATURES**

##### **Import, Export, Templates, and Roll-over Lists**

Import your existing spreadsheet list for ultra-fast setup. Create templates to reuse when adding new clients. Roll engagements over from year to year and capture all additional requests that came up during the engagement.

# 2

## *Automate Manual Tasks*

**SENDING EMAILS**, managing and updating spreadsheets, creating reports, tracking engagements, communicating with team members. These little tasks only take a few minutes here and there—until all that time spent manually managing document request lists adds up, and suddenly, you've lost a huge part of your week.

Imagine if you could get those hours back by automating mundane tasks. A good document management solution will do just that.

### **SURALINK STANDOUT**

#### **FEATURES**

##### **Dynamic Request Lists**

All your client requests are in one place, updated in real time, and accessible by everyone working on the engagement. Spend your time getting the job done, not reconciling a messy list of outstanding items.

##### **Approval Workflows**

Quickly and easily manage the lifecycle of each request. Accept requests that have been fulfilled properly and send back requests that aren't complete.

##### **Multi-Select and Action**

Make your process more efficient by selecting and actioning on multiple items at the same time. Download all client files in a section, accept all requests that have been approved, or edit a group of requests at the same time—all with just a few clicks.

##### **Back and Forth Communication**

Increase the speed and effectiveness of your client communication with the ability to add comments specific to each individual request.





## CLIENT SNAPSHOT PART 1:



In an effort to streamline the document sharing and tracking process, ControlScan was looking for an automated software solution. "I had an initiative to get rid of spreadsheets," says Marc Punzirudu, VP, Security Consulting Services at ControlScan. "When every consultant is using individual spreadsheets and working with three to five clients at a time, there was just too much paperwork to juggle."

**"With Suralink, if a client hasn't uploaded in three weeks, I can see that and approach them about it. It has really helped from the management perspective and just allowing us to following up more effectively,"** says Punzirudu.

# 3

## *Stop worrying about security*

**WITH EVERYTHING** that goes on during a security or compliance consultation, keeping your clients' sensitive information safe should be the last thing on your mind. Most firms use spreadsheets and email to manage their document lists. Not only is email one of the least secure forms of communication—easily hackable, unencrypted, and susceptible to phishing—it's almost virtually impossible to control. Documents that should be deleted, aren't. Documents get lost. And it's easy to avoid accountability because individual email accounts aren't transparent to everyone involved in the process.

**The right document management solution will feature built-in, highly advanced security measures to keep your clients' information safe—and keep you from spending precious time worrying about it.**

### **SURALINK STANDOUT**

#### **FEATURES**

- AES-256 bit encryption
- SSL/TLS digital certificate encryption
- SSAE16 Type II SOC 1, SOC 2 compliance
- TLSv2, TLSv1.1, TLSv1.2 protocol
- Cyber-liability insurance
- Two-factor authentication



# 4

## *Get Real-time Updates*

**REPORTING ON** your engagement can be time-consuming. Whether it's a client, colleague, or supervisor that needs the information, gathering, analyzing, and presenting data about your engagement's progress takes time you often don't have. And usually by the time you're done getting everything together, it's out of date and you have to start all over.

What if you could, at a glance, get real-time information about the status of your engagement, and then share it securely with the people who need it?

### **SURALINK STANDOUT FEATURES**

#### **Dashboards**

Get a bird's eye view of the document gathering process in real time. Managers can now assess the progress of an engagement at a glance. No need to have the team prep a status update. It's right there. We give you better information so you can make better decisions.

#### **Report Delivery**

Schedule reports, send them to designated recipients, control access to who sees them (inside or outside the organization), track who has received and engaged with them, and then delete them automatically to ensure clients' data stays secure.



## CLIENT SNAPSHOT PART 2:



On average, Suralink saves ControlScan three hours per engagement and reduces management overhead by 20%—no small savings across the hundreds of engagements ControlScan completes each year.

# 5

## *Spend less time managing and more time working*

**AT THE END** of the day, it's all about spending less time fighting with ever-changing document request lists and more time focusing on your engagement and your client.

“It has enabled greater visibility for us, and that’s the biggest value add.”

—MARC PUNZIRUDU

VP CONSULTING SECURITY SERVICES,  
CONTROLSCAN

No matter the type of audit you're working on—from a vulnerability management assessment to HIPAA compliance—Suralink can help you streamline and simplify the process, so you can spend more time on the interactions that matter.

## **COMPLIANCE**

SOC/SIEM

PCI

HIPAA

HITRUST

GDPR

## **MANAGED SECURITY AND COMPLIANCE**

Endpoint testing

Vulnerability management

Security awareness

IT risk assessment

PEN testing





Suralink is the leader in document request management, helping businesses simplify the audit 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 275 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the audit document exchange process.

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