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**Steven DeBlicek,
 Manager of Information Systems
 Sansiveri, Kimball & McNamee**

Sansiveri, Kimball & McNamee, LLP (SKM) is a public accounting and business consulting firm with three offices in Rhode Island. Established in 1975, SKM provides comprehensive strategic planning and business advisory services. Its practices includes accounting & auditing, tax services, financial planning & wealth management, internal audit & fraud detection, business valuation & litigation support, healthcare consulting, and technology solutions.

Challenges

As part of its tax services and audit practices, CPAs at SKM often send large PDFs, spreadsheets, and QuickBook files to and from their clients. Prior to discovering LeapFILE, these files were typically sent as email attachments. However, because of a 4MB attachment size limit imposed upon their email system, files that were larger had to be copied onto a CD or a USB flash drive and be delivered via overnight mail. SKM would end up mailing hundreds of discs and flash drives especially during the heavy tax season, and

the costs of overnight postage can be very expensive. Additionally, the turnaround time for creating the discs, sending them to clients, and receiving files can span several days.

Security of the data sent back and forth between SKM and its clients as well as keeping track of the deliveries were the two major points of concern for SKM, and its previous process of sending through email or overnight delivery did not address these needs. A more secure, easily managed, and cost effective solution was required to adhere to industry-wide standards such as AICPA best practices.

Solution

LeapFILE’s secure file delivery solution was introduced to SKM at a regional PKF meeting by another accounting firm currently using LeapFILE. After trying out the solution, SKM decided to sign up for an Enterprise-level plan that enabled SKM accountants and consultants to securely send and receive large confidential files through an easy-to-use web interface and a professional custom-branded site that matches SKM’s main website. No additional installation of hardware or software was required – LeapFILE’s solution was implemented immediately. With LeapFILE’s solution, all transfers included notification features as to when and who downloaded the files for easy tracking and verification.

Results

Tax, audit, and business advisory work for CPAs involves transmission of sensitive information. For clients who need to satisfy regulatory mandates such as Sarbanes-Oxley and for CPA firms to adhere to AICPA’s best practices on privacy protection, traditional solutions such as email attachment, FTP servers, and overnight delivery have many limitations. LeapFILE provides a solution that is secure and easy-to-use to address this routine but critical business process.

“Before LeapFILE, we had to copy large files onto CDs or USB flash drives and send them via overnight delivery which is very costly in both time and expenses,” said Steven DeBlicek, Manager of Information Systems at SKM. “With LeapFILE’s solution, we are able to send sensitive files easily and securely without administrative overhead costs or handling delays.”

