



What Is Progress ShareFile Software?

The Progress® ShareFile® secure file sharing, all in one external collaboration solution is designed for regulated and document-heavy industries. It helps businesses securely send, receive and export files, collaborate externally with clients in customizable, branded client portals and send documents for e-signature—all while supporting organizations' needs to meet strict compliance requirements (HIPAA, FINRA, GDPR, etc.).

Progress ShareFile Plans

	ShareFile Advanced	ShareFile Premium	ShareFile Industry Advantage (US Specific)	ShareFile VDR
Ideal For	Small to mid-sized teams looking for secure, auditable and easy collaborations, especially those integrating with Microsoft, Salesforce and email integrations.	Regulated industries (legal, healthcare, finance), mid-sized enterprise organizations and teams requiring legally binding e-signatures, automated workflows and support for full-scale compliance.	Prepare individual and business taxes as an accounting firm Need industry-specific templates to standardize and automate client engagements.	Law firms, investment banks, real estate firms, startups raising capital, private equity funds, corporate development teams or any company seeking secure, auditable and scalable virtual rooms for high-stakes business deals.
Key Features	<ul style="list-style-type: none"> Security and Activity Alerts that help identify potential threats File storage and sharing with encryption capabilities Email plug-ins for Outlook and Google Workspace 	<ul style="list-style-type: none"> Client collaborations tools – requests, forms, workflow automation Custom-branded client portal Support for HIPAA, SEC and FINRA compliance AI-powered document automation and templates 	<ul style="list-style-type: none"> Pre-built templates for tax engagements Custom workflow automation to accelerate onboarding Unified view of all engagements in one place 	<ul style="list-style-type: none"> Granular user permissions and document controls Real-time activity tracking and advanced analytics Watermarking, support for NDA workflows and deal room readiness

Please refer to <https://www.sharefile.com/plans-pricing> for detailed feature matrix and ShareFile Plan offerings
For cloud storage and on-prem editions, please contact your ShareFile Partner Executive to get more details

Value Proposition

Progress ShareFile is an all-in-one secure collaboration software which offers secure document workflows and seamless external collaboration. Built to reduce cybersecurity risks, boost productivity, and simplify operations, ShareFile helps organizations manage sensitive data with confidence—across internal teams and external vendors

Top Business Benefits

Faster client turnarounds

Reduce lead time in service delivery lifecycle via document request lists and signature requests, and save time creating contract agreements with repeatable, reusable templates

Improved compliance

Leverage built-in controls, audit logs and certifications for regulated use cases (HIPAA, FINRA, GDPR)

Better client experience

Simplify and centralize document exchange and task tracking with secure branded portals

Increased operational efficiency

Automate manual steps like reminders, approvals and document collection

Secure external collaboration

Easily collaborate with outside users while maintaining visibility and control

Low IT overhead

Minimize reliance on IT with a cloud-native, scalable product that integrates with Microsoft 365, Salesforce, Outlook, Gmail etc.

Who Buys It and Why?

Buying Groups

LINE SIZES

- Enterprises
- Mid-Market
- SMB
- Micro

INDUSTRIES

- Government
- Legal
- Accounting
- Banking and Financial Services
- Healthcare
- Construction
- Manufacturing
- Real Estate
- Retail, Commercial Operations

TYPE OF ORGANIZATIONS

- Organizations in regulated industries
- Document heavy, compliant industries
- Organizations that provide professional services and require external collaboration with clients/ third parties/vendors to deliver their services

Ideal Customer Profile

Role	Technology Decision Maker	Operations Decision Maker	Business Line Leader
Titles	Owner, Director of IT, IT Manager, Head of Infrastructure	Operations Manager, Practice Admin, Project Manager, Senior Coordinator	Managing Partner, Business Unit Lead, VP of Service Delivery, C-Suite
Primary Concerns	<ul style="list-style-type: none"> • Security risks from outdated tools • Industry Standard compliance (HIPAA, GDPR, FINRA, etc.) • Integration with existing tech stack(Microsoft 365, Salesforce, Google Workspace and email integrations) • User provisioning and access control • Encryption and backup/recovery 	<ul style="list-style-type: none"> • Document versioning issues • Scattered files (email, drives, desktops) • Time wasted on manual document collection • Inconsistent processes and audit trails • Lack of visibility into workflows 	<ul style="list-style-type: none"> • Client satisfaction and retention • Scaling services without growing headcount • Revenue leakage due to inefficient operations • Competitive differentiation and digital maturity • Meeting SLA commitments
Pain Points/ Buying Needs	<p>"We use email and consumer file-sharing tools. That's a risk I can't afford."</p> <p>"We're using too many tools—security is a concern."</p> <p>"I need to control access across departments without being a bottleneck."</p>	<p>"Our team spends hours tracking down the latest version of files."</p> <p>"We miss deadlines because workflows are manual."</p> <p>"We have no standard process for handling document requests."</p>	<p>"Clients expect speed and security—we can't afford to look amateur."</p> <p>"We're losing time and money with outdated systems."</p> <p>"Scaling up means automating, not hiring more."</p>



Common Buying Scenarios

Scenario	Buyer Trigger	Vendor Selection Criteria	Typical Usage and Workflows
Manual client onboarding via email	<ul style="list-style-type: none"> High support costs due to back-and-forth emails Long onboarding time, leading to client dissatisfaction Risk of missing documents or non-compliance 	<ul style="list-style-type: none"> Offers branded, secure portal for file intake Supports automated file request templates Is easy-to-use for non-technical clients Integrates with CRM or client management systems 	<ul style="list-style-type: none"> Send secure file request links with due dates and reminders Upload documents directly to client folder Track missing documents and re-send requests Use templates for standardized onboarding packages
Paper-based contracts and agreements	<ul style="list-style-type: none"> Delays in obtaining signatures Remote collaboration needed for distributed teams High printing/shipping costs and lack of audit trail 	<ul style="list-style-type: none"> Includes built-in e-signature functionality Provides version control and visibility Supports legal-grade authentication and compliance 	<ul style="list-style-type: none"> Send documents for signature directly from ShareFile account Track document status (sent, viewed, signed) to support visibility Automate reminders and trigger downstream workflows post-signature Store signed documents in designated client folders for trail of documentation and retention purposes
Internal compliance audit fails	<ul style="list-style-type: none"> Lack of file access logs No visibility into document lifecycle Audit teams require evidence of permission control and document history 	<ul style="list-style-type: none"> Offers audit trails, permissions, user activity tracking Supports Compliance certifications (HIPAA, GDPR, FINRA, ISO) Supports data sovereignty via local storage zones and retention options for audit and compliance purposes 	<ul style="list-style-type: none"> Set role-based access to files and folders Enable two-factor authentication and send encryption-based emails. Log user action (view, download, edit) Export audit trail reports for regulators or audits

Merger, acquisition or fundraising process (only applicable for VDR)	<ul style="list-style-type: none"> • Need to collaborate with external legal, finance or investor teams • Large volumes of sensitive data to share securely • Strict access control and confidentiality required 	<ul style="list-style-type: none"> • Offers watermarking, file access expiration, NDAs • Has multiple permission levels and folder isolation • Enables real-time reporting and logging 	<ul style="list-style-type: none"> • Set up data rooms with role-specific permissions • Invite external stakeholders with view-only access • Watermark sensitive documents • Track engagement by stakeholder group and export activity logs
---	---	---	---

Discovery Questions

- *How do you currently collect sensitive documents from clients?*
- *Do you use multiple tools (email, Dropbox, DocuSign, etc.) to share and manage files?*
- *Are there potential compliance or data security risks in your current document workflows?*
- *How often do clients ask for support by accessing or signing documents?*
- *Do you have visibility into who accessed specific files and when?*
- *Are manual processes slowing down onboarding, approvals or legal reviews?*

Messaging Strategy

Unlock Secure document sharing with enhanced visibility

Benefit

Exercise greater control and visibility over files and documents while collaborating with external stakeholders

Streamline your workflows with tools that drive efficiency

Benefit

Reduce turnaround time to onboard your clients and focus on delivering quality service experience

Enable seamless client collaboration across teams

Benefit

Accelerate client intake, onboarding and management for a smooth experience.

TOP COMPETITORS

- ✓ Microsoft (One Drive and SharePoint)
- ✓ Google Drive
- ✓ Adobe Acrobat Sign
- ✓ DocuSign
- ✓ Dropbox
- ✓ Box
- ✓ Egnyte

Competitive Positioning

What ShareFile Software Does Better

Security & Compliance

Supports compliance with HIPAA, GDPR, FINRA, ISO certifications; granular control; security alerts and automated threat remediation

Ease of Use

Minimizes friction for clients with email-based access and an intuitive UI

Customization

Offers a personalized client experience through branded portals and reusable templates for requesting documents, collecting information via forms and getting e-signatures for closing contracts and agreements

Integration

Integrates with Microsoft 365, Salesforce, Gmail and Outlook

Mobility

Enables business on the go with native mobile apps and access controls



Learn More www.sharefile.com

About Progress Software

[Progress Software](http://www.progress.com) (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 digital experiences with agility and ease. Customers get a trusted provider in Progress, with the products, expertise and vision they need to succeed. Over 4 million developers and technologists at hundreds of thousands of enterprises depend on Progress. Learn more at www.progress.com

© 2025 Progress Software Corporation and/or its subsidiaries or affiliates.
All rights reserved. Rev 2025/03 | RITM0319147

Worldwide Headquarters

Progress Software Corporation
15 Wayside Rd, Suite 400, Burlington, MA 01803, USA
Tel: +1-800-477-6473

- facebook.com/progresssw
- twitter.com/progresssw
- youtube.com/progresssw
- [/progress-software](https://in.linkedin.com/company/progress-software)
- [/progress_sw_](https://www.instagram.com/progress_sw_)