

How LBMC Modernizes Accounting with ShareFile Software and an AI-Forward Approach

AT A GLANCE



As LBMC grew and client expectations evolved, the firm needed a secure, scalable way to exchange documents. Progress ShareFile software helped streamline file sharing and reduce time spent searching for information, allowing teams to work more efficiently without adding friction for clients.

COMPANY
LBMC

INDUSTRY
Accounting/Finance & Consulting

PRODUCT
Progress® ShareFile®

COUNTRY
United States

Challenge

After multiple acquisitions, LBMC expanded and needed a secure, scalable way to exchange documents without slowing teams down. Inconsistent workflows and document hunting led to delays, more back-and-forth and less efficient client interactions.

“With ShareFile, I don’t have to spend my time diving for documents when I can spend my time fixing their problem instead. That productivity aspect of it is a game changer.”

Julie Carpenter
Client Accounting Specialist, LBMC

Solution



Enabled secure document sharing through Microsoft Outlook, allowing teams to send and receive files without switching tools



Used version history and audit trails to track changes, maintain accountability and support secure collaboration



Added file request links to email signatures, giving clients a fast, straightforward way to share documents

Results



Improved security and control for tens of thousands of sensitive documents, helping protect client information and maintain trust



Reduced time spent tracking down documents, giving teams more time to focus on high-value work



Streamlined employee and client onboarding during mergers and acquisitions, leading to smoother process transitions



Ready for a secure, scalable way to exchange documents? Visit us at Sharefile.com to learn more.