

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

AT A GLANCE



INDUSTRY

Accounting/Finance & Consulting

PRODUCT

Progress® ShareFile®

SUMMARY

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.

Challenge

As LBMC evolved over the years, so did the way information changed hands between teams and clients. With new employees joining from acquisitions and clients expecting quick, seamless interactions, the firm needed a more digital-first and secure way of working with clients—something easy to learn that wouldn't slow anyone down. They also had to focus on gaining and protecting trust while freeing people up to focus on the work that matters most.

Solution

LBMC turned to Progress® ShareFile® software to bring secure file sharing and collaboration into their workflows.

Key functionality that stood out included:

- Microsoft Outlook integration, allowing large documents to be sent and received securely without leaving email
- File request links in email signatures, giving clients a fast, familiar way to share information
- Version history and audit trails, so teams always know what changed and when
- Flexible structures by practice area, supporting different workflows across the firm

These capabilities helped standardize how information is shared, while still giving teams the flexibility they need.

Results

With ShareFile software in place, LBMC made it easier for teams and clients to exchange information quickly and securely—even as the firm continued to grow.

“The ability when my clients say, ‘I either need something or I need to send you something,’ I can do it in a matter of seconds—and it speeds up their life. That’s the most important thing for me.”

Darren Forish
Shareholder, Tax, LBMC

“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

The impact included:

- Secured management of tens of thousands of sensitive documents, strengthening internal standards and client confidence
- Streamlined onboarding for employees and clients during mergers and acquisitions
- Improved communication using familiar tools like Microsoft Outlook, reducing back-and-forth and delays
- Reclaimed time for meaningful work as teams spent less time tracking down files

Supporting an AI-Forward Mindset

As LBMC improves the way teams manage documents, it’s also exploring how AI can simplify internal work—minimizing time spent digging for information and increasing time spent supporting clients as they begin their own AI journeys. Guided by a practical, forward-looking leadership team, the firm is laying the groundwork for progress that balances efficiency with responsibility.

By pairing secure collaboration with forward-looking technology, LBMC is positioning itself for continued growth—without compromising the high-quality service that clients expect.

“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.

Looking Ahead

LBMC plans to continue delivering high-end services while expanding its use of AI to enhance internal workflows and improve client experiences. With ShareFile software supporting secure collaboration across the firm, teams are well equipped to scale—all while staying responsive, efficient and client-focused.

About LBMC

LBMC is one of the top 35 accounting firms in the United States, supporting clients with a wide range of tax, accounting and advisory services. As the firm continues to grow—both organically and through acquisitions—teams remain focused on delivering a high-quality service while adapting to changing client expectations and evolving work practices. www.lbmc.com



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

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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