

Hay & Watson at a Glance

- Boutique Accounting Firm
- No. of staff: 18
- TitanFile client since: 2019
- www.hay-watson.bc.ca

“ We chose TitanFile because it is just so easy to use. TitanFile has helped us become significantly more efficient in the way we securely collaborate with our clients. ”



Essop Mia
Firm Partner

How TitanFile Helped Hay & Watson Accountants Improve Security and Efficiency Around Client Collaboration



About Hay & Watson

Hay & Watson is a boutique firm of Chartered Professional Accountants in Vancouver, BC that is passionate about working with organizations to help them achieve their financial goals and objectives.

Through continuous innovation, adaptation, and client focus, Hay & Watson has established an esteemed reputation for delivering exceptional accounting services to its clients since 1986.

The Challenge

Hay & Watson provided services for many corporate and personal clients which involved tax and financial documents being exchanged every day. Previously, the firm did not have a client portal in place. Staff would password-protect confidential PDF documents before sharing them and this process was not up to the firm's standards for several reasons:

- Each tax season, the firm shared thousands of sensitive documents and it was inefficient to password-protect each one
- Clients would often contact the firm to acquire assistance with opening password-protected files
- Clients did not have a standardized method of uploading documents securely to the firm

The firm's leadership team wanted to fill the gaps in efficiency while simultaneously improving security within the firm. Its vision was to deploy a secure cloud-based solution that enabled easy, two-way file sharing and collaboration between the firm's staff and its clients. The solution also needed to host client data on Canadian servers.



“ During the busiest times of the year, we’re now receiving 90% fewer support calls from our clients. TitanFile has enabled them to easily share documents with our firm, and access the documents we share with them.”

Essop Mia
Firm Partner

Interested in learning more about TitanFile?

Book a demo at:
[**titanfile.com/book-a-demo**](https://titanfile.com/book-a-demo)

The Solution

TitanFile was exactly what Hay & Watson was looking for, a client portal that was as easy to use as email and provided state-of-the-art security.

With TitanFile, the firm’s staff and clients had self-serve access to securely exchanging confidential files and messages. Files did not need to be password-protected ahead of time, as all files shared through TitanFile were automatically encrypted in transit and at rest, and stored on certified data centers in Canada.

In addition, the cloud-based platform could be accessed from anywhere and on any device, giving staff and clients the ability to collaborate while they were in the office, at home, or on the go. TitanFile kept all client files and messages in one secure location.

The Result

Since the deployment of TitanFile, the platform has become a mission-critical tool for Hay & Watson and the firm uses it daily to securely exchange files and communicate with its clients.

Hay & Watson has been experiencing improved turnaround times, reduced support calls from clients, and peace of mind for staff and clients.

1) Improved turnaround times for exchanging files

Staff no longer need to password-protect sensitive documents before sending them to clients. They can simply upload and send, as TitanFile automatically encrypts information in transit and at rest.

2) 90% reduction in support calls from clients

Clients now have self-serve access to a secure client portal where they can easily upload and download files without requiring any assistance from the firm.

3) Peace of mind for staff and clients

Even during the busiest times of the year, staff has peace of mind knowing that they can efficiently handle the volume of work they have while keeping client data secure with the best-in-class technology.

About TitanFile

TitanFile is an award-winning secure messaging and file sharing platform for external correspondence among professionals, their support staff and clients. TitanFile is as easy to use as email, resulting in increased efficiency, cost savings and higher customer satisfaction while improving security and compliance.