

ACCOUNTING & PROFESSIONAL SERVICES

# More Billable Hours. Less Compliance Risk. Delighted Clients.

AI-powered document and workflow automation increases utilization, strengthens governance, and delivers a modern client experience, natively inside Microsoft 365.

**THE OPERATIONAL REALITY**

- Staff burning billable time across Practice Management, SharePoint, drives & email
- Manual approvals & scattered reviews driving non-billable overhead
- SOX & ISO 27001 pressure — no unified audit trail
- 15–20% staff turnover driven by long hours, weak work life balance and tedious admin.

THE CHALLENGE

## Operational Friction in Accounting Firms

Accounting firms rely on client documents, engagement files, audit workpapers, financial statements and correspondence to deliver accurate, timely, and compliant services. But when that information is fragmented across systems and difficult to trust, utilization



### Information Chaos

Client files live across Practice Management, SharePoint, drives, Virtual Cabinet, and email. Staff waste hours switching systems to find what they need.



### Low Utilization

Repetitive supervisory reviews, “Four Eyes” approvals, manual onboarding, and scattered reviews consume billable capacity at scale every engagement cycle.



### Compliance Exposure

SOX, ISO 27001/22301, and client confidentiality demand airtight document control that most firms can't demonstrate under audit.



### Talent Retention

15–20% annual turnover driven by manual admin burnout. The problem compounds every tax and audit season without intervention.

THE SOLUTION

## From Operational Friction to Connected, Audit-Ready Accounting

M-Files for Accounting Firms eliminates operational friction by connecting client documents, workflows, and compliance evidence to the clients and engagements they support, so every team works from a single, trusted source of truth.



### Eliminate Information Chaos

Client files live across Practice Management, SharePoint, drives, Virtual Cabinet, and email. Staff waste hours switching systems to find what they need.



### Increase Utilization

M-Files automates reviews, approvals, and onboarding workflows with full visibility. By connecting documents and workflows in one place, firms reduce manual effort and maximize billable capacity.



### Strengthen Compliance

M-Files enforces governance with built-in audit trails, permissions, and version control. All compliance evidence is connected and traceable, ensuring continuous audit readiness.



### Improve Talent Retention

M-Files eliminates repetitive admin work through automation and structured workflows. Staff work in familiar tools like M365, Outlook and Teams, reducing burnout and supporting retention.

# M-Files Is Built for Modern Accounting Firms

M-Files delivers Context-First Document Management, connecting documents, data, and workflows into a unified system that reduces operational friction and gives firms a performance advantage.

Native to Microsoft 365, M-Files allows teams to work directly in Outlook, Teams, and SharePoint while governance, automation, and compliance happen seamlessly in the background.

AI-powered search operates on governed, permission-aware data, ensuring results are accurate, explainable, and trusted for client work and compliance.

- ✓ **Stop searching. One view of every client file, every system.**
- ✓ **Automate Supervisory reviews and four yes checks, independence checks & client onboarding**
- ✓ **Automated audit trails — always ready, zero scramble**
- ✓ **Hubshare client Portal — branded, secure, 24/7**
- ✓ **Lives in Outlook. No migration. Quick time to value.**
- ✓ **ISO 27001:2022 certified**

## WHAT MAKES M-FILES DIFFERENT

### **Completely Connected**

All client info in one place regardless of system. No migration. Structured and unstructured data, unified.

### **Future of Client Collaboration**

Hubshare delivers a branded, secure 24/7 portal to win, retain, and delight clients through a superior digital experience.

### **Native Microsoft 365 AI**

The only DMS built to supercharge M365 Copilot and Copilot Agent Builder with governed content that never leaves your Microsoft environment.

### **Adoption All But Guaranteed**

Lives inside M365, Teams & Outlook. Customers report immediate “wow factor.” Resistance turns to support within weeks.

### **Context-First, Not Folder-Driven**

Organized by what it is — client, engagement, doc type — not where it was saved. The right version, every time.

### **Purpose-Built for Accounting**

Proven with Crowe UK, PKF Francis Clark, RSM Hungary, Horne LLP. Pre-configured, not bolted on.

## WHAT ACCOUNTING LEADERS SAY

**700+**

**Users Deployed**  
PKF Francis Clark

**40%**

**Less Search Time**  
M-Files Benchmark

**1,200+**

**Firm Trust M-Files**  
Gartner Customers' Choice

**94%**

**Would Recommended**  
Gartner Peer Insights

“

Document security is much simpler, more flexible and transparent.

National Technology Director  
Crowe UK

“

There's a reduction in the risk our clients are taking on because we now control those documents and that data so much better than we did before.

Dave Bufkin — CIO  
Horne LLP

**M-Files**

SEE M-FILES IN ACTION

**Request a personalized demo —  
built for accounting firms.**

REQUEST A DEMO

