

Enhancing the value and ease of client collaboration

ShareFile accelerates processes, secures data for Strategic Treasurer

An industry-leading specialist

Strategic Treasurer's success is rooted in a range of core values, including maturity, knowledge, consistency, extensive proprietary research and being a trusted collaborator with their clients.

Founded by Managing Partner Craig Jeffery in 2004, and based on the outskirts of Atlanta, Georgia, [Strategic Treasurer](#) provide consultancy, research and outsourced treasury services to a range of corporate clients in the US and beyond, around half of which have annual turnovers in excess of \$5 billion.

Strategic Treasurer consultants are former corporate practitioners with on-the-ground expertise that they now share with a growing global client base, underpinned by the business' extensive use of data and industry research, and client-specific insights. Strategic Treasurer is also an industry-leading media creator, including podcasts, webinars and their own specialist online news channel, CTMfile.

Transfer and client collaboration

The role of a trusted collaborator is one that Strategic Treasurer are particularly proud of and was a key factor in their decision to adopt [Citrix ShareFile](#). Jeffery was looking for a tool that would enable the business to share documents and other files easily and securely, both internally and externally with clients and partner firms. "Attaching files becomes increasingly challenging when file sizes exceed email capacities," he notes.

The business had built its own solution but was running into issues as business and client requirements and volumes grew. "We were looking for an industrial-strength solution with vendor support," Jeffery explains. "ShareFile offered a great way to share information and work on it together, especially with people outside the organization."



Industry

Financial services

Location

Georgia, USA

Citrix products

- [Citrix ShareFile](#)
- [Citrix RightSignature](#)

Over a decade later, and Strategic Treasurer's use of ShareFile has grown and developed, forming an integral part of their consulting and project processes. Both clients and internal users can respond to documentation requests and simply drag and drop the necessary files, automatically generating alerts so users are kept fully informed of progress.

"We also use it for podcast and video production," says Jeffery. "We record people from all over the globe, and they just drop in audio or video files and we can edit and save them directly. That's the type of collaboration it allows, and it's very intuitive."

A secure client environment

In Strategic Treasurer's fields of operation, the most important aspect of trust is security. Whether the client is a bank, a tech operator or a corporate giant, data integrity and security are critical factors that Strategic Treasurer solves with ShareFile.

"You could use a secure email and have it run through all the rules on data loss prevention to make sure a loss doesn't happen, which is difficult. But if you can share something that isn't exposed, stays secure the entire time and is simple to use, it's much easier to share for both our organization and our clients," says Jeffery.

Crucially for Strategic Treasurer, ShareFile supports the principle of least privilege, enabling Jeffery and his team to define and enable specific access rights for individuals or groups of users. "It's a single place to work. We can set up the structure so everyone can see what they need and nobody can see what they shouldn't," he notes. "It's very easy to manage, and that's really powerful for us."

Strategic Treasurer have also extended this capability to create secure archives for clients. "A lot of our compliance work can contain significant amounts of tax, personal or account information," says Jeffery. "ShareFile allows us to build a secure vault that customers can access over time in a secure, controlled and automated manner."

Simplifying their processes in one place

Rounding off the ShareFile experience for Strategic Treasurer is its native, embedded e-signature functionality, which enables the business to abandon paper documentation and wet signatures while also maintaining visibility across a project or contract's approval processes, right in their ShareFile files.

"The beautiful thing about the integrated e-signature in ShareFile is the full audit trail it provides," explains Jeffery. "It simplifies everything. There are no hand-offs, no multiple touch points and everyone has an original immediately."

"The integrated e-signature in ShareFile has saved us at least 1,000 hours a year."

**Craig Jeffery, Managing Partner
Strategic Treasurer**

“Replacing the paper-based approval process with an integrated e-signature in ShareFile certainly saves us at least 1,000 hours a year,” he continues. The e-signature is also used internally as staff sign out equipment or confirm receipt of important files such as employee handbooks.

“ShareFile has become an essential and comprehensive tool for us,” concludes Jeffery. “We’re looking forward to taking more advantage of the workflow activities and using [native editing capabilities](#) for Microsoft 365 files. That’s a really powerful aspect for us, and we still have much to explore.”

“It’s a single place to work. We can set up the structure so everyone can see what they need, and nobody can see what they shouldn’t.”

**Craig Jeffery, Managing Partner
Strategic Treasurer**

Enterprise Sales

North America | 800-424-8749

Worldwide | +1 408-790-8000

Locations

Corporate Headquarters | 851 Cypress Creek Road, Fort Lauderdale, FL 33309, United States

Silicon Valley | 4988 Great America Parkway, Santa Clara, CA 95054, United States

©2022 Citrix Systems, Inc. All rights reserved. Citrix, the Citrix logo, and other marks appearing herein are property of Citrix Systems, Inc. and/or one or more of its subsidiaries, and may be registered with the U.S. Patent and Trademark Office and in other countries. All other marks are the property of their respective owner(s).

