# Soraban Appoints Steven Lopez as Vice President of Customer Experience to Scale Firm Capacity Nationwide

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SAN FRANCISCO, CA - March 18, 2026 -
Soraban, the intelligent tax workflow execution layer helping accounting firms move more 1040s without adding headcount, today announced the appointment of Steven Lopez as Vice President of Customer Experience. His appointment reflects Soraban's continued investment in helping firms translate workflow automation into real capacity gains during peak season.

Lopez joins Soraban at a pivotal stage of growth, bringing a track record of transforming customer success, support, and professional services organizations to deliver exceptional customer experiences and long-term customer value. His mandate is to ensure every customer achieves measurable capacity gains quickly and predictably, not just through product adoption, but through stronger implementation, clearer workflow alignment, and faster time to value.

Firms are short on expertise; they are short on throughput and capacity. As firms adopt Soraban to eliminate manual friction across intake, data entry, and delivery, customer experience becomes a strategic lever ? not just a support function. Lopez will lead the expansion of Soraban?s onboarding, implementation, and support infrastructure to convert automation into operational relief at scale, helping firms reduce administrative drag before work reaches preparers and reviewers

?Steven has built and scaled world-class customer success and support organizations that don?t just support customers, they drive measurable business outcomes for customers,? said Enoch Ko, Founder & CEO of Soraban. ?For our customers, that means faster adoption, smoother workflow transformation, and real capacity unlocked.?

As adoption accelerates, Soraban is expanding its Arizona-based support team to meet growing demand. The investment strengthens hands-on onboarding, shortens response times, and delivers proactive workflow guidance, especially critical as firms prepare for peak season. It also gives firms more direct access to

specialists who understand the day-to-day realities of tax intake, document handling, handoffs, and return delivery.

Key initiatives Lopez is leading include elevating customer success training to mirror real-world tax workflows, expanding specialized support resources for faster issue resolution, and introducing measurable success benchmarks tied directly to firm capacity gains. Those benchmarks are intended to reflect the outcomes firms care about: less time spent chasing documents, fewer manual touchpoints, smoother movement of information into tax software, and more consistent return delivery.

Lopez brings over a decade of experience and is known for building disciplined, accountable organizations that combine operational precision with deep customer empathy. An essential balance in an industry that values control, accuracy, and predictability. That combination is especially important in tax, where even small workflow breakdowns can create downstream delays, added review burden, and unnecessary pressure on staff during compressed deadlines.

?My focus is straightforward,? said Lopez. ?When a firm chooses Soraban, they?re not buying software ? they?re buying capacity. Our job in customer success is to make that capacity visible, measurable, and immediate.?

Soraban?s mission is simple: remove workflow bottlenecks so accounting professionals can focus on high-value client work ? not chasing documents, correcting manual errors, or managing handoff chaos. Across its connected workflow, Soraban helps firms handle client connection, organize workpapers, automate data movement, and simplify final delivery so more returns can move forward with less friction.

With Lopez leading customer experience, Soraban reinforces a clear message to the market: automation without execution isn?t enough. Firms deserve both.

And as capacity becomes the defining constraint in modern accounting, Soraban is doubling down on delivering it ? cleanly, consistently, and at scale.

About Soraban

Soraban is the most trusted and intelligent tax workflow automation platform that powers modern accounting firms. Purpose-built for accountants and admins and battle-tested through 5 tax seasons, we understand the pain. Soraban takes on tasks from client data collection, organizing workpapers, automating data entry to your tax software, and the final delivery to your client. Letting you use your time and expertise to create

exceptional client experiences. Learn more at www.soraban.com

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## Soraban

*Soraban is the trusted tax workflow automation platform for accounting firms. Built for accountants and admins, it handles client intake, workpapers, data entry, and final delivery ? freeing your team to focus on exceptional client experiences.*

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