



 suralink


PKF

Case Study



THE CLIENT:

PKF International is one of the most respected audit and consulting networks in the world. PKF is present in 150 countries, with 440 offices and more than 20,000 employees. We spoke to members at PKF Littlejohn and PKF Octagon about their experience using Suralink.

 : PKF locations using Suralink



THE BACKGROUND:

Prior to 2019, PKF teams were primarily using email and spreadsheets to request, receive, and track client information when performing audit and tax work.

This outdated process was messy and wasted time for clients and team members. Client documents and answers were lost in inboxes, tracking progress took Houdini levels of magic, and the bottomless pit of email exchanges continued to pile up.

DID YOU KNOW?

24% of Americans believe they check email “way too much”. (Adobe)

“Client information was not centralized and was getting lost in email inboxes. Suralink improved the flow of information.”

ADRIAN WASOWICZ

Audit Supervisor, PKF Octagon



KEY AREAS OF FOCUS



Improving the flow of
information between teams
and clients



Clarity into the status
of all requests



Reducing email
dependency and centralizing
client information



Ability to identify issues early



Strong data governance and
information security

THE GOAL:

PKF identified opportunities to streamline the information gathering process for its teams and clients.

The main goal: saving time and providing a better experience.

DID YOU KNOW?

According to Data Marketing Association,
99% of users check their email at least
once per day.

THE SOLUTION:

In 2019, PKF Littlejohn implemented Suralink to improve the audit process and client experience.

Suralink combines a **dynamic request list, document management and assignment workflow** to request and collect client information in a user friendly way. Tracking the status of engagements and providing updates only takes a few seconds. The best part, it's secure and clients love it.

Clear and centralized process

Suralink's platform serves as a single location for client interaction, removing the need to rely on emails and decreasing the number of client conversations happening through email.

Engagement progress tracking

Suralink's platform has an easy-to-read dashboard, timeline and instant notifications to make sure tracking is a breeze.

Automated status updates

Suralink's status reports provide an easy overview of outstanding, fulfilled, returned, and accepted requests along with any overdue and upcoming requests. Send them off individually or schedule them through automation.

Engaged and happier clients

Suralink's user interface is intuitive and easy to use for clients and team members. Requests and files are neatly organized allowing for efficient and smooth client interactions.



THE RESULTS:

Time Savings

*“The efficiency that you see increases with the number of team members or number of people on the client side. Previously if you were using three team members, flying emails around, it was hard to be efficient. **With Suralink, the efficiency benefits are plain to see.**”*

KAREN EGAN

Director, PFK Littlejohn

*“The easy status update email function is also **a time multiplier** for us.”*

ADRIAN WASOWICZ

Audit Supervisor, PKF Octagon

Clear & Consistent Processes

*“**Suralink adds clarity to requests for information**—particularly when we ask the client for quite specific data or there’s room for misunderstanding.”*

KAREN EGAN

Director, PFK Littlejohn

*“A large number of our audits are international. We wanted a solution that would provide a consistent client experience and process across the entire PKF network. It doesn’t matter if we’re working with a client’s office in Africa, Europe, or South America, **they’re getting the same experience and process.**”*

PHIL BROADBERY

Auditor, PFK Littlejohn

Client Satisfaction

*“**All of my clients love Suralink!** It has provided greater oversight of information requests both from client’s and audit team’s perspective. It has made the PBC list process less of a chore.”*

EMILY BAVIN

Audit Manager, PFK Littlejohn

