



 suralink

 PKF LITTLEJOHN

Case Study

HEADQUARTERS: LONDON, ENGLAND

PARTNERS: 31

EMPLOYEES: 270

OFFICES: 3

LOCATION: UK

FEE INCOME: \$40 MILLION

UK TOTAL OF STOCK MARKET CLIENTS: #8*

PKF Littlejohn implemented Suralink in early 2019 to help improve the audit process and client experience.

Previously PKF Littlejohn staff used a mixture of software for data collection. In line with its ethos of simplifying complexity, the firm identified opportunities to streamline the information gathering process and improve the process for its teams and clients.

PKF Littlejohn wanted real clarity over the status of all audit requests, the ability to identify issues early, and to provide strong data governance and information security.



The Suralink set up process was very quick and user-friendly—no additional software was required.

Client data requests are streamlined through Suralink, providing clients with a single view of requests and expectations. Any questions are dealt with in the portal, keeping everything in one place.

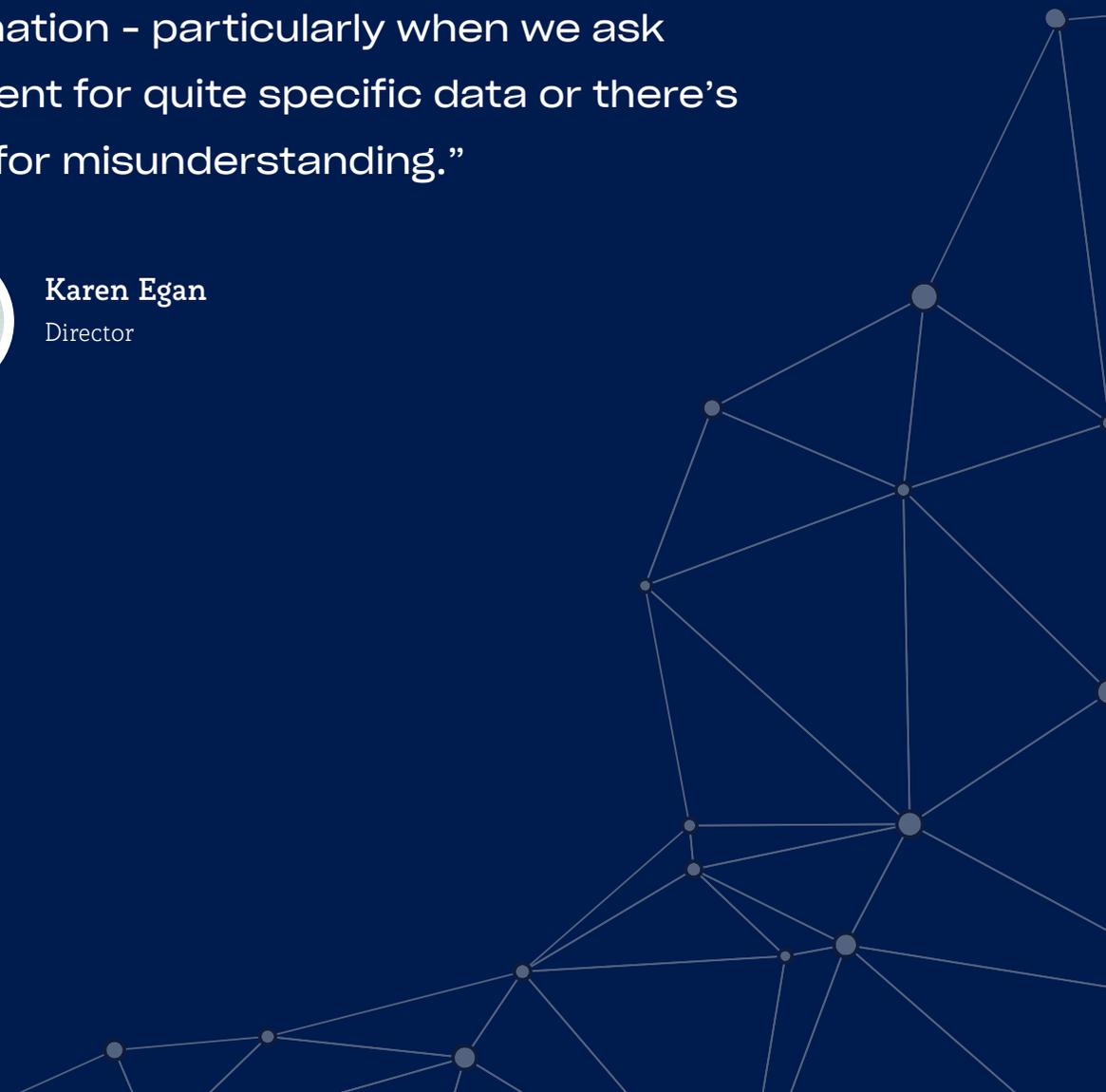
A key benefit for clients is the ability to allocate requests within their team and set appropriate visibility. Avoiding a bottleneck in communications while providing visibility to the management team.

The PKF Littlejohn team noted increased transparency and greater efficiencies in monitoring. Suralink provides an audit trail and summarised statistics via a dashboard to indicate the status of all requests.

“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





Suralink also helps us enhance internal management with detailed reports on all projects.

The PKF Littlejohn team uses these reports to track client responses and flag potential delays affecting audit bookings. This helps the team plan and optimise resourcing.

Client feedback has been excellent, making the job of the client's financial function simpler and more efficient.

“It is so user-friendly and really easy to use. I haven't had to explain to clients how to use it. ”



Emily Bavin
Audit Manager

CONCLUSION:

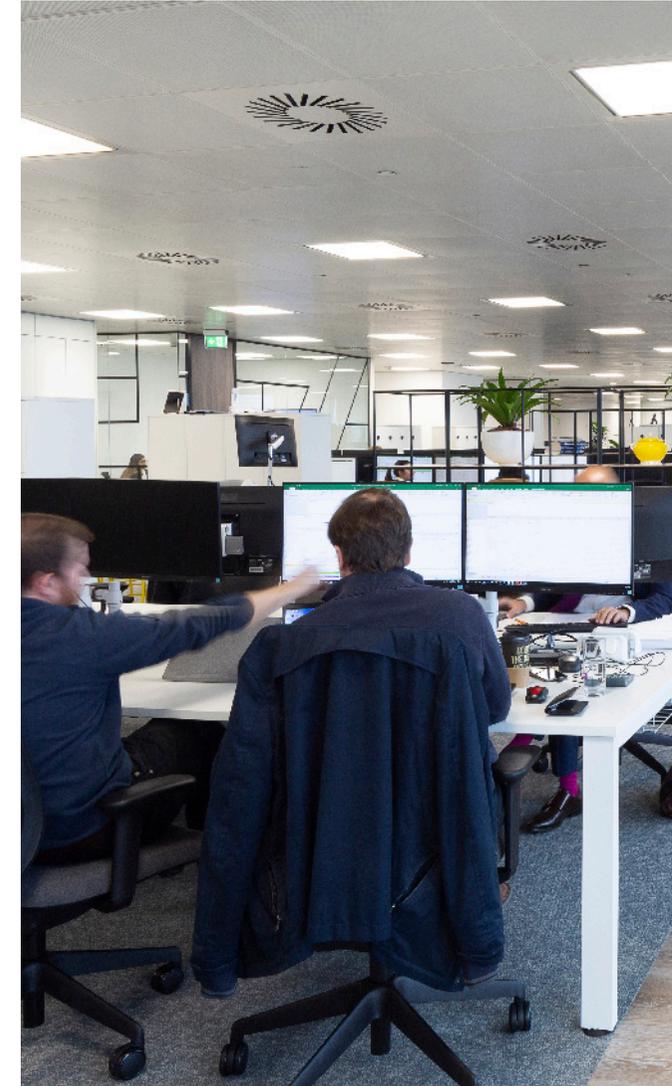
All audit staff have noted that the management of client data requests has become streamlined and clear.

From an internal management perspective, the team has clearer oversight of which clients may be slow to respond and can make arrangements to ensure that audit efficiency is maintained.

“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



“As an ex-auditor, I could see the value of the software and the efficiency. I’ve had some familiarity with the software the big four use, so I knew how much efficiency could be gained from that type of solution. And Suralink is very similar. The ability to have the statistics of the engagement is very useful. In a quick look you can gauge the progress of an engagement, which is hard to do when you’re flipping through emails.”



Arjun Khanna
Auditor/Analyst

“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
Partner

“IT is an increasingly important part of an audit. Suralink ensures that we are using the latest technology in the audit process and this really adds value to the clients.”



John Black
Senior Audit Manager

“Information requests are much easier to follow with Suralink. Being able to see exactly when the client has uploaded information is great, and it’s extremely helpful that we can respond to individual documents with queries or clarifications.”

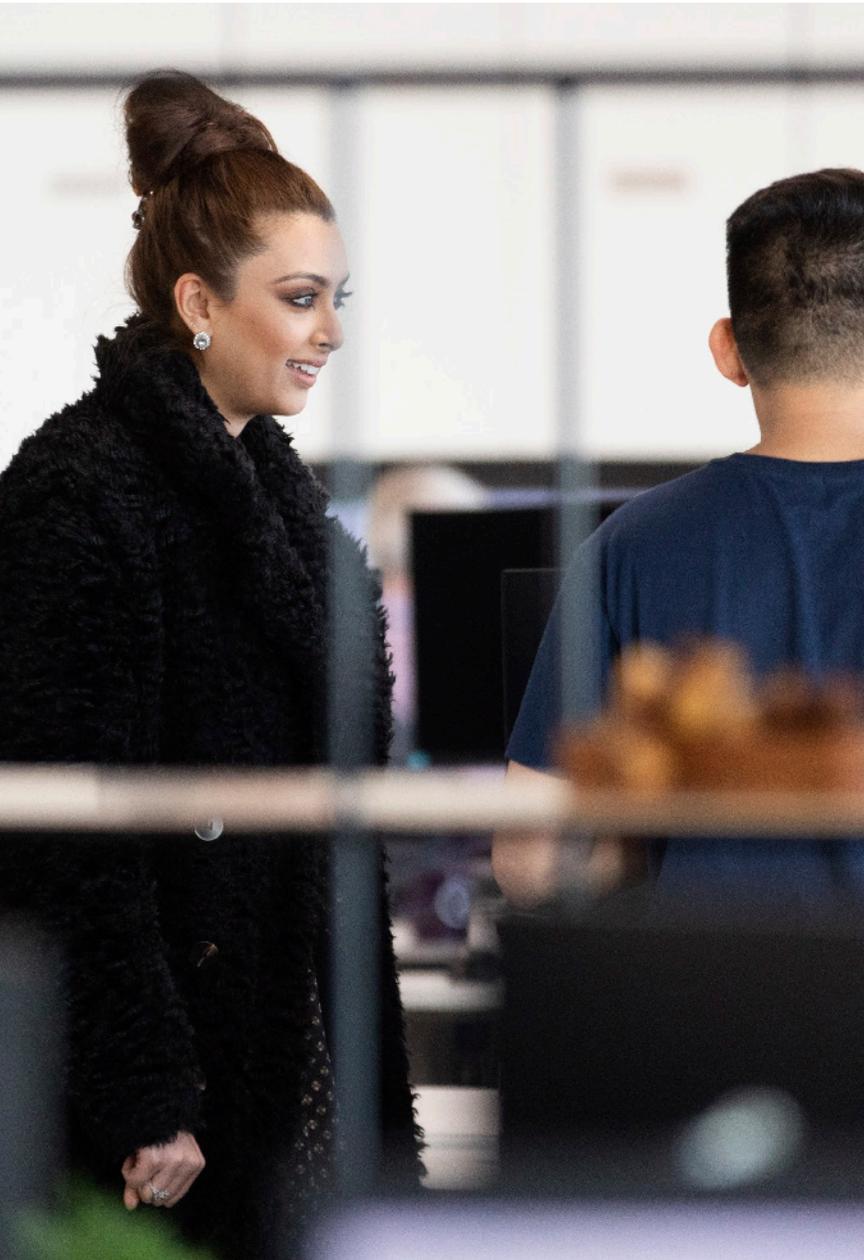


Karen Egan
Director

“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



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Suralink is the leader in request list and document management, helping businesses simplify the document exchange process while improving the client experience.

The company's cloud-based application integrates a dynamic request list and assignment workflow solution with a secure file hosting platform to serve as a single location for client interaction. Suralink's technology, combined with its industry expertise, helps more than 330 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the document exchange process.

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