



Five Ways a PBC Solution Simplifies and Streamlines Busy Season





Many firms in the US require accountants to work at least **55 hours per week** between January 1 and April 15.

Make busy season a little *less busy*

Busy season can be brutal. And we all need a stock of drinks, snacks, and playlists to get through. While caffeine is critical, choosing a PBC request list management solution can be just as important. Instead of just getting you through, **the right software can actually make busy season more streamlined, more efficient and a little less busy.**

1.

Get a jumpstart on the season

BUSY SEASON seems to sneak up on us every year. You can see it coming... but before you know it. It's January and you're not ready. Even though engagements are 90% the same year to year, you might not have a good way to roll them over.

A good PBC solution will allow you to create templates, copy engagements, or roll them over so you're ready for busy season before it even begins. Imagine the time you could save if, going into busy season, your PBCs were ready for every client—not just getting started.

Suralink Standout Features



IMPORT, EXPORT, TEMPLATES, AND ROLLOVER LISTS

Import your existing spreadsheet PBC list for ultra-fast setup. Create templates to reuse when adding new clients. Roll engagements over from year to year and capture all additional requests that came up during the engagement.

CLIENT SNAPSHOT PART 1

Henry + Horne— Starting Early

Henry+Horne was founded in 1957 by two CPAs to provide tax, accounting and business consulting services. Sixty years later, its team of approximately 150 highly skilled professionals are still focused on its clients' success and overall financial well-being.

Henry+Horne have worked with Suralink since 2016, including three busy seasons. Suralink gives Henry+Horne an earlier start. For many clients under the old system, PBCs would only be ready about a month before the engagement. Now Henry+Horne can take 2018 engagements, for example, and roll them over to 2019, make edits, and activate them.

“This really just gives us a jumpstart,” says Bach. *“We now have PBCs in clients' hands before the year is even completed. It's a huge timesaver.”*



2.

Automate Manual Tasks

SENDING EMAILS, managing and updating spreadsheets, creating reports, tracking engagements, communicating with team members. These little tasks only take a few minutes here and there—until all that time spent manually managing PBC request lists adds up, and suddenly, you've lost a huge part of your week.

Imagine if you could get those hours back by automating those busy-work busy season tasks. A good PBC solution will do just that.

Suralink Standout Features



DYNAMIC REQUEST LISTS

All your client requests are in one place, updated in real time, and accessible by everyone working on the engagement. Spend your time getting the job done, not reconciling a messy list of outstanding items.



APPROVAL WORKFLOWS

Quickly and easily manage the life cycle of each request. Accept requests that have been fulfilled properly and send back requests that aren't complete.



MULTI-SELECT AND ACTION

Make your process more efficient by selecting and actioning on multiple items at the same time. Download all client files in a section, accept all requests that have been approved, or edit a group of requests at the same time—all with just a few clicks.



BACK AND FORTH COMMUNICATION

Increase the speed and effectiveness of your client communication with the ability to add comments specific to each individual request.



90% of accountants say they work at least 50 hours per week during busy season.

3.

Stop worrying about security

WITH EVERYTHING that goes on during busy season, keeping your clients' sensitive information safe should be the last thing on your mind. Most firms use spreadsheets and email to manage PBC lists. Not only is email one of the least secure forms of communication—it's almost virtually impossible to control. Documents that should be deleted, aren't. Documents get lost. And it's easy to avoid accountability because individual email accounts aren't transparent to everyone involved in the process.

The right PBC solution will feature built-in, highly advanced security measures to keep your clients' information safe— and keep you from spending precious time worrying about it.

Suralink Standout Features



INTENSIVE SECURITY PACKAGE

- AES-256 bit encryption
- SSL/TLC digital certificate encryption
- SSAE16 Type II SOC 1, SOC 2 compliance
- TLSv2, TLSv1.1, TLSv1.2 protocol
- Cyber-liability insurance
- Two-factor authentication

“It’s been great for us it’s secure for our clients. Everything I’ve heard on the client side has been positive. I’ve actually had a couple clients say, ‘What took you so long to get something like this.’”

—PATRICK THOMAS
AUDIT SUPERVISING SENIOR, PP&CO



4.

Get Real-time Updates

REPORTING ON your engagement can be time-consuming—time that is even more precious during busy season. Whether it's a client, colleague, or supervisor that needs the information, gathering, analyzing, and presenting data about your engagement's progress takes time you often don't have. And usually by the time you're done getting everything together, it's out of date and you have to start all over.

What if you could, at a glance, get real-time information about the status of your engagement, and then share it securely with the people who need it?

Suralink Standout Features



DASHBOARDS

Get a bird's eye view of the document gathering process in real time. Managers and partners can now assess the progress of an engagement at a glance. No need to have the team prep a status update. It's right there. We give you better information so you can make better decisions.



REPORT DELIVERY

Schedule reports, send them to designated recipients, control access to who sees them (inside or outside the organization), track who has received and engaged with them, and then delete them automatically to ensure clients' data stays secure.

CLIENT SNAPSHOT PART 2

Henry + Horne— Saving Time

Before Suralink, Henry+Horne was spending anywhere from one to six hours per week managing engagements. Now, accountants just run a status report out of the platform and report on it during 30-minute meeting.



5.

Spend less time managing and more time working

AT THE END of the busy season, it's all about spending less time fighting with ever-changing PBC lists and more time focus on your engagement and your client.



Suralink is the leader in PBC request list management, help accounting firms simplify the audit process while improving the client experience.

The company's cloud-based application—built by accountants for accountants— integrates a dynamic PBC request list and assignment workflow solution with secure file hosting platform to serve as a single location for client interaction. Suralink's technology, combined with its industry expertise, helps more than 450 of the leading firms in North America and the UK ensure security, simplicity, transparency, and accountability throughout the audit process.

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