suralink™

Five Ways a Request List Solution Increases Efficiency

Automating request list management.

Managing the hundreds or thousands of documents required to complete an audit, tax, or advisory engagement is time-consuming, stressful, and inefficient. But choosing a request list management solution can be the solution you didn't know you needed. Instead of just getting you through, **the right software can actually make your processes more streamlined, more efficient, and a lot more productive.**

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1.

Get a jumpstart on the season

ANNUAL ENGAGEMENTS seems seem to sneak up on us every year. You can see them coming ... but before you know it, they're here 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 request list solution will allow you to create templates, copy engagements, or roll them over so you're ready for an engagement before it even begins. Imagine the time you could save if, going into an engagement, your client request lists were ready—not just getting started.

Suralink Standout Features

IMPORT, EXPORT, TEMPLATES, AND ROLLOVER LISTS

Import your existing spreadsheet request 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.

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PKF Littlejohn - Streamlining the information gathering process

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.

Client data requests are now 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.

"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, PKF Littlejohn

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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 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 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.

60% of businesses have experienced a data breach—almost all of them introduced via email.

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 client request 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 request list management 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.
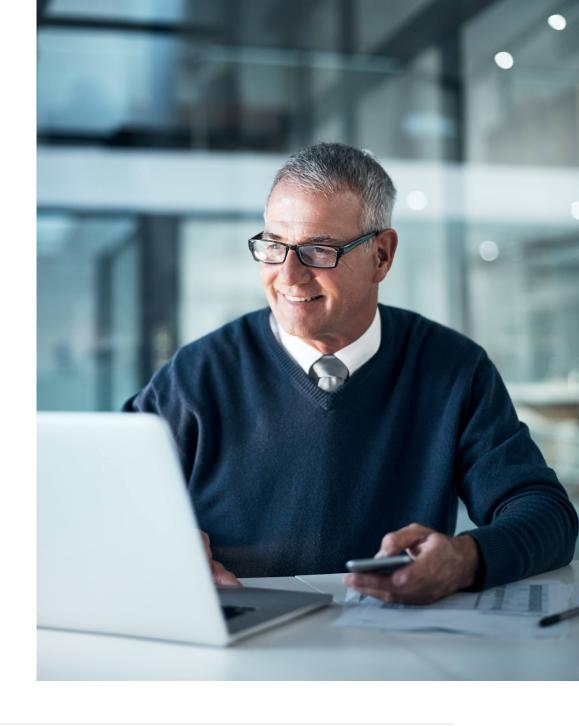
Suralink Standout Features

INTENSIVE SECURITY PACKAGE

- AES-256 bit encryption
- SSL/TLC digital certificate encryption
- SSAE16 Type II SOC 1, SOC 2 compliance
- GDPR 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

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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.

PKF Littlejohn - Improving the Client Experience

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, PKF Littlejohn

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5.

Spend less time managing and more time working

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

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Suralink provides professional services firms with a single, secure platform to collaborate with clients, exchange documents at scale, and track the progress of engagements. With enterprise-grade security and an easy-to-use interface, Suralink's award-winning client interaction portal helps firms increase efficiency and improve their relationships with their clients.

Suralink's open platform is used by over 500,000 businesses worldwide.

CONTACT US

sales@suralink.com
801.203.0002

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