



Case Study

PKF IGNITE

Upskilling staff, increasing revenue:
How PKF Ignite employs automation
to empower its people



**From 10 to 18 clients
per staff member**



**Staff feel
empowered**



**Clients love
the ease of use**



About

PKF Ignite is a cloud-based accounting extension to PKF South Africa's business advisory services. With 175 staff, they have offices in Johannesburg, Durban, Port Elizabeth and George.

Nicole Rousseau joined PKF Octagon as the co-founder and Head of PKF Ignite. Poised to head a digital advisory unit that harnesses cloud technology, the solution soon became a new business unit for one of the most reputable accounting firms in South Africa.



Opportunity

PKF saw automation as a sleeping giant: a way to upskill staff and add value for clients. In April 2019, they made Receipt Bank the foundation of their app stack and process automation.

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Solution

PKF Ignite built the foundations of their automation on Receipt Bank. Clients use the platform to submit paperwork on the go, while Supplier Rules and Auto Publish enable efficient sorting and categorisation of expenses.

If staff are still waiting on paperwork, they no longer need to chase over email. Instead, they'll share with clients an automatic Outstanding Paperwork report with a list of pending items. Rousseau and the team then use the Receipt Bank dashboard to track progress.

After building trust in the accuracy of their client data with Receipt Bank, PKF Ignite took their automation one step further. They invested in a bot to link their core accounting apps and check data quality. This freed up staff to only check for anomalies and focus on account management.

"Here in South Africa, bot technology is expensive and could cost more than a million rand to deploy," says Rousseau. "We employed a Head of Robotics to make this affordable for SMEs." They now use the bot for internal engagement and plan to use it to link Xero with Receipt Bank and Spotlight.



Nicole Rousseau
PKF Ignite Spot Accounting

To implement new operating procedures successfully, PKF needed to reinvent the wheel. "It's a massive change management process," says Rousseau. "We needed a project plan to ensure transparency and reassurance, plus buy-in and endorsement from leadership."

"Some people embraced the tech immediately, others were more hesitant. We made sure we were transparent, clear and consistent in our communication, sharing project plans ahead of any changes to get buy-in."



Impact

Automation gave PKF the opportunity to upskill staff, while raising morale and customer satisfaction.

“Our staff can now work on more senior work and talk more to clients, which used to be the work of a manager or director. They feel like a business partner in their clients’ businesses,” says Rousseau.

Before automation, clients would see their financial statement three months down the line. Now, staff check their clients’ finances daily and weekly rather than once a month. They check only for anomalies, identify issues before they become problems and proactively help clients. Things that may have slipped under the radar are now caught with ease.

“Our team is now more proactive. Just as we changed our ways, our clients changed theirs. Receipt Bank made that change very easy,” says Rousseau. “Clients love the ease of use. And directors love that they have control again. They’re getting more inquisitive, asking what the data means for them.”

With Receipt Bank and automation, PKF Ignite have grown their staff to client ratio by 80% - from ten to 18 clients per staff member.

Want to invest in your team and revenue growth?

Book a consultation today

Receipt Bank can help your practice become more productive. Speak with one of our product experts today

www.receiptbank.com/consultation



1
Client submits paperwork through Receipt Bank



2
Receipt Bank extracts the data



3
Automate with Supplier Rules and Auto Publish.
Send Outstanding Paperwork report to clients



4
Track team progress with the Receipt Bank Dashboard