How engagement teams can close the Client Readiness Gap

It's not a lack of effort, skill, or technology. It's the inability to get the right information from clients, the first time—what we call the Client Readiness Gap. This short guide walks through what's causing the gap, how it's impacting engagement delivery, and what leading firms are doing to close it.

1. What's happening at most firms

- 36% of requests fulfilled correctly the first time
- 30%+ of engagements off-track
- 93% of firms struggling with staffing
- This isn't a people problem—it's a workflow problem

2. What causes the gap

Challenge	Impact
Disorganized PBC tracking	Missed files, confusion, client frustration
Inaccurate/ incomplete requests	Rework, delays, missed budgets
Manual prep + review	Burnout, rising costs, missed margins

3. The better way with Suralink

Legacy Approach	Suralink + Work Paper Suite
Email & Excel PBC Lists	**Centralized request management platform**
Never-ending follow-ups	**Pinned comments in-file**
Manual prep	**Automated workpaper preparation**
Rework & frustration	**40%+ time savings**

Is it time to make a change?

Ask your team:

- **Are we still chasing the same requests over and over?**
- **Are deadlines slipping even when everyone's working hard?**
- **Are we protecting our people or wearing them down?**

If yes: This is the gap you need to close.

Let's talk about fixing this