



# 10 Signs Your Engagement Process Is Slowing Down Your Firm

A data-backed checklist for accounting firms and engagement teams



# Why this checklist matters:

You're hitting deadlines. You're delivering quality work. But your team still feels overwhelmed, and clients do too.

## **It's not your people. It's the process.**

Disorganized document requests, back-and-forth emails, and unclear responsibilities are quietly draining time and energy from your firm. And it's costing you more than just efficiency, it's affecting realization, team morale, and the client experience.

This checklist helps you quickly assess where friction lives in your engagement process—and what to do about it.

### **What the data shows:**

- **75% of clients say managing engagements feels like a second job.**
- **82% cite unclear or time-consuming requests as their #1 frustration.**
- **78% would consider switching firms over a disorganized request process.**

*\*Inside the Client Experience Report, Suralink*



# Engagement Process Self-Assessment

## How many of these apply to your firm right now?

- You're constantly following up on the same requests.** Clients miss items because instructions are unclear or requests get buried in inboxes.
- You rely on a combination of spreadsheets and portals to track request lists.** Outdated tools make it hard to stay aligned or up-to-date in real time.
- You're downloading client support documents to your desktop.** This increases risk and introduces avoidable admin work.
- Staff waste time figuring out which files are associated with which request.** Over 50% of requests are not fulfilled completely the first time. Support docs and PBCs are scattered or disconnected.
- You get halfway through preparing a workpaper and realize critical files are missing.** No system in place to communicate which requests are completely ready and which are not.
- Junior staff ask the same process questions every engagement.** Onboarding takes longer because workflows aren't standardized or intuitive.
- You're sending more back-and-forth emails, creating friction between you and your clients.** 65% of clients say reducing back-and-forth would most improve efficiency. Engagements are cluttered with clarification, not progress.
- You can't see where the bottlenecks are—until it's too late.** Lack of real-time visibility means you're reactive, not proactive.
- Your team is stretched thin during every engagement.** Manual tasks compound stress and reduce capacity.
- Clients say your process feels disorganized and not transparent, even if deadlines are met.** Client perception matters—78% say poor collaboration would make them switch firms.

### If you checked four or more...

You're not alone, and you don't need a full system overhaul to fix it. Firms using Suralink have reduced time spent on client requests by **up to 50%**, improved realization, and delivered a more consistent experience across offices, teams, and service lines.





Suralink is the connected client collaboration platform trusted by 500+ top accounting firms to streamline PBCs, document intake, and engagement workflows.

We help firms:

- Reduce back-and-forth and request turnaround times
- Centralize client support docs and communication
- Deliver smoother engagements for clients and staff
- Track request status in real time

Ready to see it in action?



Book a 30-minute walkthrough to see how Suralink works on a real engagement.

*Learn more at [www.suralink.com](http://www.suralink.com)*

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