

How PKF Ignite Transformed

a Weeks-Long Engagement Process
& Now Signs Clients in Under a Day

“When you want an advantage over other firms, how you treat your clients is everything. Practice Ignition is the only solution I’ve seen that consistently delivers a great experience for our clients — and leaves them excited to work with us.”



Nicole Rousseau,
Head of PKF Ignite

The Client: PKF Ignite

PKFIGNITE

Industry: Accounting

Location: South Africa

What We Provided: Streamlined internal engagement process

- Automatic payment function
- Engagement letters
- Workflow integrations
- Built-in analytics

PKF Ignite is a bespoke cloud-based accounting solution. By leveraging cutting-edge cloud-based technology, it helps businesses manage a wide variety of financial processes, including bookkeeping, payroll, VAT and tax compliance, invoicing, budgeting and more.

PKF Ignite is an extension of one of South Africa's largest mid-tier accounting and business advisory firms, PKF South Africa.

The Challenge

Time-consuming and admin-heavy engagement process

Before Practice Ignition, sending proposals and engagement letters to potential new clients was a long and cumbersome process. Even when using templates, creating these forms took hours, and that was before they went through internal approval - and then finally got sent to the client. This cumbersome process could add weeks to the engagement.



Clients then had to print, sign, scan, and then send the engagement letters—which could be up to 20 pages long—back to PKF Ignite. The entire process was admin-intensive and it would often take an additional one or two weeks for signed forms to make their way back to us.

Once PKF Ignite received the engagement letter, it needed to be entered into their accounting and billing software. Unfortunately, none of these systems talked to each other. Manually creating invoices from their engagement letters left room for human error, inefficiencies, and—of course—wasted time that could have been spent further assisting our clients or winning new business.

“We were trying to make it a pleasure for clients to deal with our firm, but an admin-heavy engagement process was getting in the way. The last thing we wanted was for a smaller firm to swoop in and secure the client while we were still working on the engagement letter.”

Nicole Rousseau, Head of PKF Ignite

The Solution

Simplified & user-friendly engagement process

According to Nicole Rousseau, Head of PKF Ignite, Practice Ignition revolutionised their engagement process. With Practice Ignition they're able to bring up engagement letter templates, automatically populate them with terms of service, and add customer-specific details like payment terms with a few simple clicks.

To Nicole's relief, the system is extremely intuitive. After Practice Ignition showed her how to format one engagement letter, she had no problem using the system to begin streamlining all of their client interactions.

Even better, Practice Ignition makes life easier for PKF Ignite's clients. Proposal, contract, and payment terms are all gathered together and ratified with one easy signature. Clients can also set up automatic payments directly through proposals, removing the headache of managing annual renewals.

“Once a client accepts our proposal, Practice Ignition automatically pulls the agreed upon fees from the document to generate monthly recurring invoices in Xero. You can even go a step further and connect Practice Ignition to Xero Practice Manager which then creates a task in XPM based on the proposal. It makes task management super easy!”

Nicole Rousseau, Head of PKF Ignite

“Our average start-to-finish engagement time—from first contact to writing the engagement letter to getting the client's signature—is now within eight hours. It's a simple process and there's no need to follow up. That makes a massive difference. When clients see how professional and easy engagement is, they can't wait to work with our firm.”

Nicole Rousseau, Head of PKF Ignite

The Result

New clients signed in under eight hours

Even with templates, creating proposals and engagement letters used to take Nicole and her team hours. **With Practice Ignition, that process takes under ten minutes.**

Gaining internal approval for engagement letters, sending them out, and then chasing client signatures often took up to two weeks. Even after the letter was signed, PKF Ignite still needed to enter client information into their billing software and manually create invoices. **With Practice Ignition, the engagement letter is created, sent out, and signed—all within an average of eight hours.**

But while PKF Ignite has already experienced substantial time-savings, Nicole says that's not the biggest benefit. What she values most about Practice Ignition is that it enables her to make life easier for clients and demonstrate PKF Ignite's value starting from the first engagement.



91%

of our customers spend less time creating proposals, and chasing signatures and payments

87%

were able to cancel other software subscriptions

80%

have fewer (or no) unpaid invoices at any given time

And the majority of Practice Ignition customers are closing more and bigger deals...

[Find out more](#)

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