

# Dext

# Case study

## **PKF Ignite**

How PKF Ignite employs automation to empower its people

## **Upskilling staff**

increasing revenue



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## 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 Dext the foundation of their app stack and process automation.

"We chose Dext because it's solution-agnostic," says Rousseau. "We liked the fact that it can move and grow with us. We're migrating our entire client base unless there's a business case not to."



## Solution

PKF Ignite built the foundations of their automation on Dext. 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 Dext dashboard to track progress.

After building trust in the accuracy of their client data with Dext, 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 Dext and Spotlight.

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."



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## 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. Dext 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 Dext 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?**

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