

For today's audit, advisory and tax professionals, change has become a constant. Markets are more competitive, clients are more demanding, and technology is disrupting almost every facet of the profession. That's why winning and retaining business requires a new strategy.

THE CLIENT EXPERIENCE IS KING

This is the 'age of the customer' and delivering a great client experience is now imperative to success. But how do you create engaging and valued relationships that deliver measurable business value?

Focusing your organization around better client service requires you not only to work faster, but also smarter. You need to be agile to compete, and be able to effortlessly mobilize organizational knowledge and expertise to deliver exceptional quality. Doing this means changing how you work with each other, and transforming how you work with clients.

Improved collaboration between teams and clients is key to this transformation.

To help you embrace the change, Huddle, the leader in secure cloud-collaboration, has identified four critical success factors that characterize collaborative, client-focused leaders.

Follow these and you are well positioned for success.

An increase in client satisfaction improves billable utilization and year-on-year growth.

A recognized leader in cloud collaboration, Huddle is the industry's most trusted and proven way to mobilize your teams around your most demanding client engagements.

From audit and tax engagements to advisory projects, Huddle's cloud-based workspaces make it easy for internal teams and clients to come together, share and edit files, assign tasks and track team activity in a secure, shared environment.

FOUR SUCCESS FACTORS:

1. Be more agile

In a global economy, agility has become as important as ability. An agile firm is able to respond quickly to opportunities and is better prepared to help clients navigate market complexity and grow. Unfortunately, as organizations mature they often lose the agility that defined their initial success.

Client-focused leaders understand that to meet client expectations they must be able to mobilize knowledge and expertise from across multiple service lines or geographical locations quickly and effectively.

Consideration:

Consider how cloud collaboration technology can improve client outcomes by breaking-down knowledge silos within your business and helping teams to better connect and share expertise.

Whether it's bidding for new business or delivering client projects, cloud collaboration tools can be deployed to better manage documents and tasks, share files, and securely communicate across a dispersed team.

Our clients credit Huddle with helping them to win millions of dollars of new business and improving billable utilization by reducing bid response times by 30%.



FOUR SUCCESS FACTORS:

2. Be more mobile

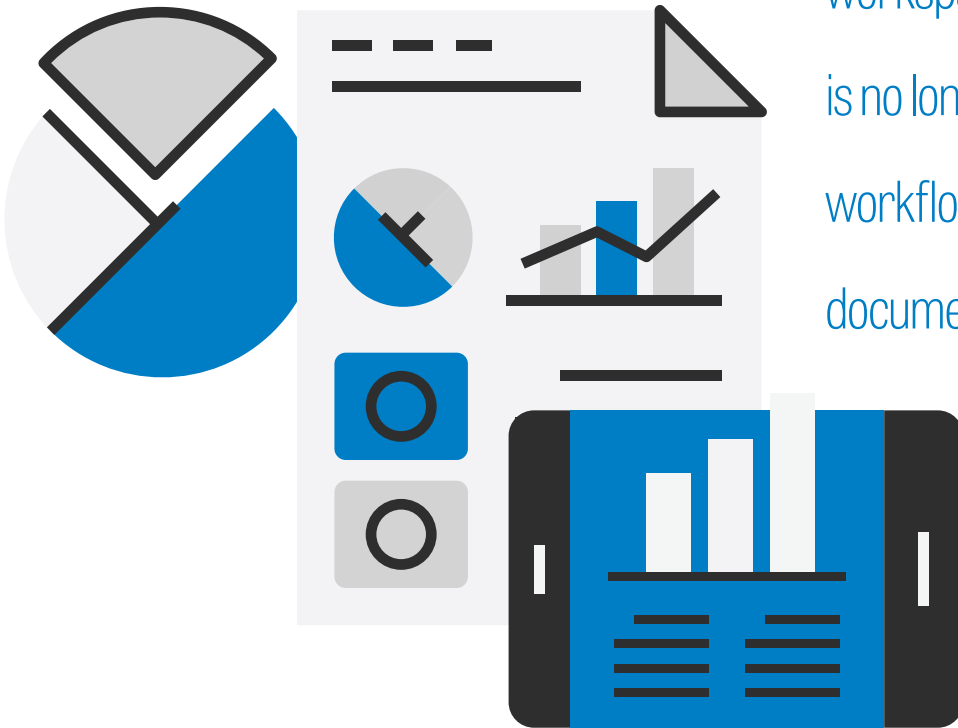
39% of industry professionals have missed a deadline while waiting for documents to be approved by a manager who was travelling or working away from the office¹.

Client-focused leaders understand that we are no longer tethered to physical desks. Whether in the office, on the road or at client sites, teams need to be confident in their ability to work seamlessly, manage approvals and follow team communication as they hop between devices and locations.

Consideration:

65% of industry professionals use a smartphone for work every week, while almost a quarter (22%) use a tablet². Understand how workflows span multiple devices and enterprise applications in your organization, and how cloud collaboration technology can remove some of the productivity blocks that occur as users move between locations and devices.

Huddle delivers true cross-device continuity. Our cloud-based workspaces mean physical location is no longer a barrier to approval workflows, team communication or document management.



1. Huddle (2015)

2. Forrester Vendor Landscape: Document Centric Collaboration (Q4 2015)

FOUR SUCCESS FACTORS:

3. Be more engaging

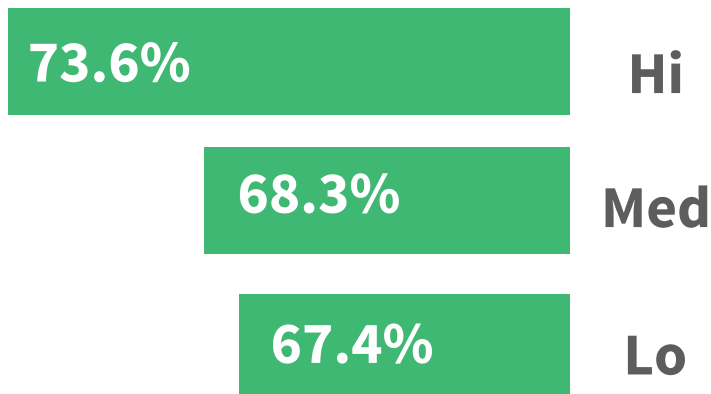
In the age of the customer, clients expect a more social and collaborative working relationship where ideas are shared and projects monitored with greater transparency.

Allowing clients to contribute reference materials, review deliverables and provide feedback with full auditability means creating secure, shared working environments. However, client collaboration beyond the corporate firewall using legacy on-premise technology can be cumbersome and often requires considerable IT effort. Client-focused leaders understand that technology must not be the barrier to meeting client expectations.

Consideration:

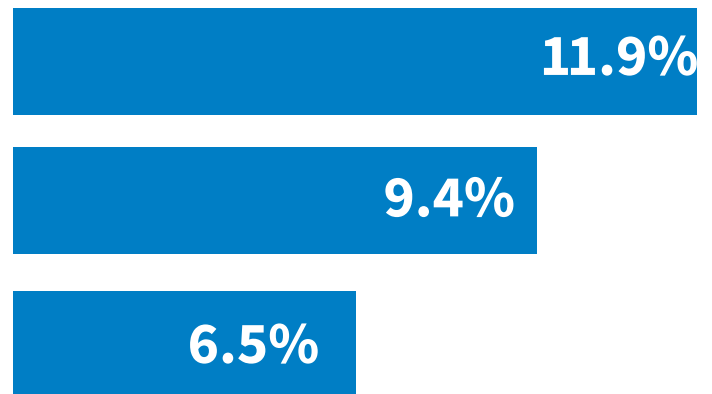
Map your client journey and evaluate how engaged and informed the client is at each stage of the engagement process. Consider how shared cloud-based working spaces for all stakeholders will improve not only productivity, but also client satisfaction. Research shows that increased client satisfaction delivers greater growth and billable utilization.

Improved billable utilization



Source: 2015 Benchmark Report: SPI Research (2015)

Improved YoY revenue growth



Whether gathering client documentation, managing the flow of sensitive information across all stakeholders, or sharing project deliverables, Huddle keeps clients engaged and informed.

FOUR SUCCESS FACTORS:

4. Reduce risk

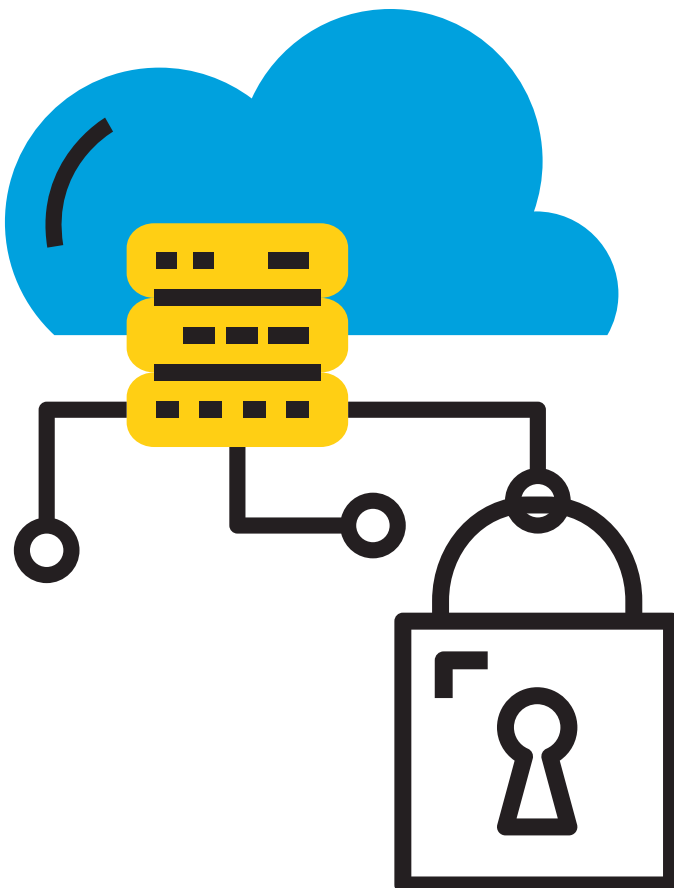
However you look to achieve greater employee efficiency and improved client satisfaction, there's no room for error. Maintaining governance over your internal processes remains critical not only to the quality of client deliverables, but also to your brand.

43% of industry professionals admit to losing a hard copy of a document and 80% admit to using unsecured USB flash drives to share files¹. This type of shadow IT adds risk to your operations as teams circumvent enterprise tools to get work done.

Client-focused leaders understand that security must be balanced with the flexibility to allow teams to function.

Consideration:

Shadow IT breaks audit trails and exposes your business to data protection issues. Audit the shadow IT tools that are currently in use across your organization (including consumer-grade file sharing apps and USB flash drives) and consider how a mandated cloud-collaboration solution can meet both productivity needs and security requirements.



Combining rigorous security and time-stamped audit trails of user and document activity, with an easy to use interface and a consumer-like experience, Huddle gives you the confidence to collaborate.

1. Huddle (2015)

Why cloud-collaboration?

As more and more organizations realize the value of improved team and client collaboration, so the market for the technology grows. But how do you engineer your organization for success and what do you need to look for in a solution?

ENGINEER YOUR TEAMS FOR SUCCESS

Understanding how teams currently work together, and with clients, is imperative to building a more collaborative, client-focused organization and building a business case for success.

Evaluate how projects are managed today; they likely encompass a wide ecosystem of virtual teams, partners, clients and suppliers. Are these teams able to work effectively together with the tools available to them?

- When you need to collaborate beyond the corporate firewall, is your ability to do so hindered by legacy document management systems?
- When you want to seamlessly move between devices and locations, and continue working, can you?
- Are you still chained to email, managing multiple conversation threads and document versions?

Collaboration technology is estimated at \$4bn globally, comprising 10% of an enterprise's technology budget².



44% of technology decision makers consider the deployment of collaboration technologies as a high / critical priority for their organizations¹.

1 - 2: Source: Forrester Vendor Landscape: Document Centric Collaboration (Q4 2015).

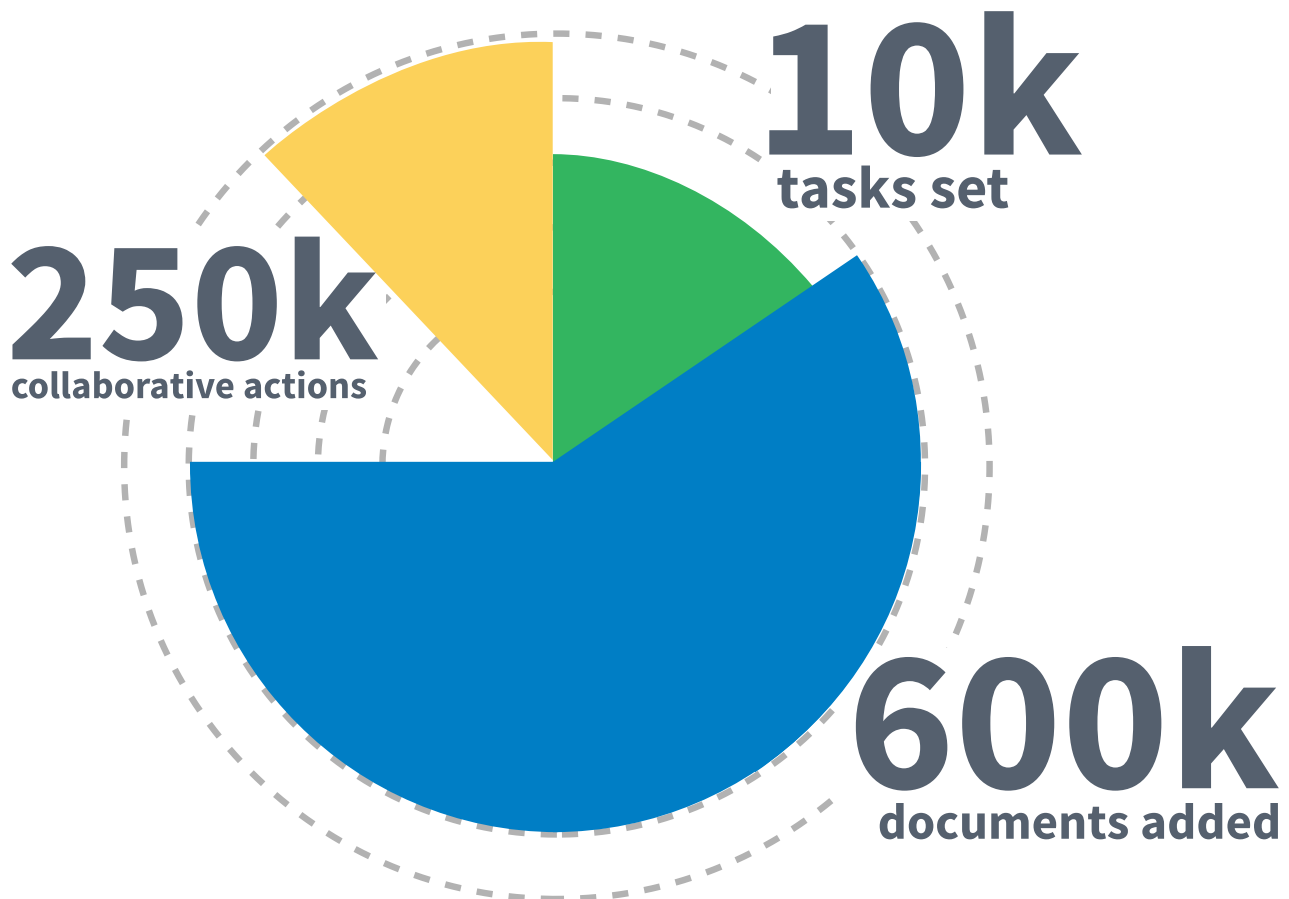
WORKING WITH HUDDLE

Huddle is the world's most trusted solution for secure, cloud-based collaboration. Used by governments and by more than half of the world's top 10 accounting firms, Huddle helps your teams to come together around your most important client engagements.

A key component in any organization's digital workplace strategy, Huddle's cloud-based workspaces make it easy for your teams and clients to securely collaborate together on projects, share and edit files, assign tasks and track team activity.

No other solution makes it this easy, and secure, to keep teams synchronized, documents managed, projects on track and clients engaged.

Every Month



The value of collaboration with Huddle

WIN MORE BUSINESS:

The requirement for a client collaboration solution is becoming standard in RFPs. With a global brand, our clients credit Huddle with helping them to win millions of dollars of new business. Better team collaboration across your new business and bid teams means you'll also be able to respond to bids faster and more accurately. Our clients see an average time saving of 30%, greatly improving billable utilization.



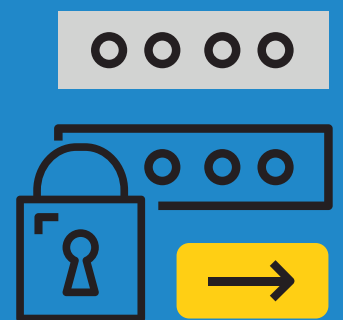
RETAIN AND GROW MORE BUSINESS:

Client engagements are no longer a one-way push of information. Your clients expect greater transparency of the process, including the ability to collaborate with your project team in a shared environment, track deliverables and monitor progress. Engaging clients in this way also opens up greater visibility of client work to other teams and service lines, enabling greater opportunities for upsell and cross-sell.



INCREASED EFFICIENCY WITH LESS RISK:

People will always follow the path of least resistance to get their work done as efficiently as possible. To mitigate the use of shadow IT, Huddle pulls together key workflows – from document sharing, commenting, approval management and task setting - maintaining the audit trail and meeting your governance standards with a time-stamped log of user and document activity.



What clients say

“Customers report that Huddle is simple for end users to use. This provides a high level of adoption and little user resistance.”

GARTNER (2015)

“Huddle is very intuitive. Our people are productive almost immediately.”

BAKER TILLY INTERNATIONAL

“The use of Huddle as a collaboration tool is invaluable and contributes to our awarding of contracts.”

TOP 10 GLOBAL ACCOUNTING FIRM

“Our teams are in a stronger position to deliver fast, strategic growth and distinctive service.”

TOP 10 GLOBAL ACCOUNTING FIRM

“Huddle is intuitive to use and impressive to our clients.”

BAKER TILLY INTERNATIONAL



About Huddle

Create, share and work with clients in a secure cloud-based environment. Keep projects on track, documents organized and your teams synchronized across all devices.

As the industry's most trusted solution for cloud-collaboration, Huddle helps your teams to come together around your most important client engagements.

- A single interface to manage the collaborative nature of today's client engagements.
- Sophisticated permissions. Lock workspaces across geographical teams or lines of business.
- Greater visibility for Partners who need to oversee activity and track deliverables.
- Robust security assures the integrity of client data.
- Suite of native mobile apps.
- All document and user activity is auditable and trackable.
- Check clients have viewed key documents and tasks.
- Infinite roll-back to past document versions.
- Built-in approval workflow.
- Securely upload and download files.
- Cloud-based, allows easy access for staff in the field.
- Ability to meet NDA requirements for control and removal of sensitive reference materials.
- Centralized calendar to schedule project activity and manage tasks.
- Fully integrated with Microsoft Office tools (Excel, Word, Outlook, and PowerPoint). Save and open Huddle documents within Microsoft tools, add and review document comments.

**For more information, or to request a demo,
please visit huddle.com**

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