

Transaction Id	Doc/Ref No	Transaction Type	Entry Number	Reporting Date
1731	5901	CHECK	1	1/1/2023
1731	5901	CHECK	2	1/1/2023
1733	5902	CHECK	1	1/2/2023
1733	5902	CHECK	2	1/2/2023
1734	14	JOURNAL ENTRY	1	1/2/2023
1734	14	JOURNAL ENTRY	2	1/2/2023
1732	71334	SALES RECEIPT	1	1/3/2023
1732	71334	SALES RECEIPT	2	1/3/2023
1732	71334	SALES RECEIPT	3	1/3/2023
1732	71334	SALES RECEIPT	4	1/3/2023
1735	5903	CHECK	1	1/7/2023
1735	5903	CHECK	2	1/7/2023
1736	71335	SALES RECEIPT	1	1/9/2023
1736	71335	SALES RECEIPT	2	1/9/2023
1736	71335	SALES RECEIPT	3	1/9/2023
1736	71335	SALES RECEIPT	4	1/9/2023
1737	5904	CHECK	1	1/10/2023
1737	5904	CHECK	2	1/10/2023
1738	71336	INVOICE	1	1/12/2023
1738	71336	INVOICE	2	1/12/2023
1738	71336	INVOICE	3	1/12/2023
1738	71336	INVOICE	4	1/12/2023
1739	5905	CHECK	1	1/12/2023
1739	5905	CHECK	2	1/12/2023
1740	5906	CHECK	1	1/15/2023
1740	5906	CHECK	2	1/15/2023
1741	71337	SALES RECEIPT	1	1/15/2023
1741	71337	SALES RECEIPT	2	1/15/2023
1741	71337	SALES RECEIPT	3	1/15/2023
1741	71337	SALES RECEIPT	4	1/15/2023
1742	5907	CHECK	1	1/15/2023
1742	5907	CHECK	2	1/15/2023



CASE STUDY

Learn how Strongbox has helped the Kroll Transaction Advisory Services (TAS) team become more efficient with a tool that automatically delivers accurate data straight to Excel.

AT A GLANCE

GOALS AND BENEFITS

- Improve efficiency through automation initiatives
- Enhance speed with technology
- Adopt tools that are easy to use that can be leveraged by experienced team members
- Reduce time to aggregate data



"I think that's what was attractive to our leadership team about Strongbox. It's not a whole system. It's Excel. We already have Excel. It's not that big of a change, and it's really easy to use."

SCOTT ELSTON

Director, Transaction Advisory Services

THE PRACTICE

Kroll's TAS team has been providing quality due diligence services for over 20 years. Scott Elston, a Director on that team, collaborates with colleagues to improve and expand process improvement / automation initiatives to ensure TAS continues to enhance its quality client service prospectively.

THE OPPORTUNITY

TAS is focused on adding additional technology solutions to help the group work toward its goal of continuous improvement. "One of our objectives was to help improve our automation initiatives and unlock time and efficiency for the team. This allows us to continue to deliver on-time and cost efficiently on all our clients' mandates."

In his search, Scott heard about Strongbox from a colleague.

"There's been a significant focus on automation in the news recently, and a colleague told me about Strongbox, so I decided to evaluate the capabilities."

THE RESULTS

"I think whenever you automate a process, as long as the automation is working as intended, you're going to enhance quality control and deliver a more reliable and accurate result when leveraged by an experienced and talented team.

One of the criteria evaluated when determining to add technology is will this progression help us deliver a better solution to our clients?

And the answer was a resounding yes for the businesses using QuickBooks."

