

Illustrative example. Ashby Clarke Accountants is a fictional company. This scenario shows how a typical professional services business would set up and use Verika; it does not describe a real customer or report real results.

EXAMPLE SCENARIO · PROFESSIONAL SERVICES

Ashby Clarke Accountants

Leeds, UK · 26 people · 3 partners

An accountancy firm makes its processes, policies and templates answerable on demand, so juniors stop interrupting partners for how things are done here.

BEFORE VERIKA

- Juniors asked partners and managers how to bill, which template to use and what the process was.
- The staff handbook and procedures existed, but answers were buried in long documents.
- Client onboarding steps were followed slightly differently by different teams.

WHAT THEY GAVE VERIKA

- Client onboarding and anti-money-laundering procedures
- Engagement letter templates and guidance
- Time recording and billing policy
- Staff handbook and HR policies
- IT and data security policy
- File naming and style guide

SETTING UP

Day 1

The practice manager connects the firm's SharePoint policies library.

Days 2–3

Partners answer suggested questions about client acceptance and billing.

Day 4

All staff are invited; partners and the practice manager are experts.

Ongoing

Policy updates in SharePoint flow through automatically.

WHAT THE TEAM ASKS

“Which engagement letter template do I use for a new limited company?”

TRAINEE

EL-04 (company accounts and tax). Partners must approve any change to the scope wording.

Engagement Letter Templates

“How do I record non-billable time?”

JUNIOR

Use code INT-01 for internal work and INT-05 for training. Everything is entered by Friday 5 pm.

Time Recording Policy

“A client wants us to start before the engagement letter is signed. Can we?”

SENIOR

No. Nothing starts until the letter is signed and ID checks are complete. Escalate to the client partner.

Answered by a partner, approved

“How do we name client files?”

NEW STARTER

Client code, year end, document type: ABC123_2026-03_TR. Drafts get _DRAFT on the end.

File Naming Guide

WHEN VERIKA DOESN'T KNOW

“Can I work from abroad for two weeks?”

The handbook didn't cover it, so Verika said so and logged it. The practice manager answered once (only with written approval from your manager and IT, and not from restricted countries), and the answer is now in the knowledge base.

WHAT CHANGES

- Partners spend less time answering process questions.
- Policy answers quote the current document, with its name.
- Client onboarding follows the same written steps across teams.

WHAT TO MEASURE IN YOUR OWN TRIAL

- Process questions reaching partners each week
- Gaps logged and answered
- Onboarding checklist completion



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