



Embedding Sightline into your proposal

**Introduce clients to the way we deliver Tax, Legal
and People services via Sightline**



How to leverage this deck effectively

- Keep the technology simple, this isn't supposed to overload the client
- Consider what the client is asking for before adding in all the slides
- Use CoPilot, ChatGPT, or similar, to check the win themes
- Pick the slides that works best and tailor them
 - Slides 3-6 are similar in content but structured differently to give examples
 - Slides 8-9 again are similar, showing how we connect other tools to Sightline. Pick the best one and use the [CTC Technology site](#) for more details.



Sightline

Enhancing governance and delivery with AI insights

Sightline is how PwC delivers clarity and control

- It's a single portal that gives you 24/7 access (including via the Microsoft Teams app) to financial data, compliance status, returns, reports and our entire technology suite.
- It's your control tower for engagement management and insight that connects the dots.
- Powerful Sightline AI will enable you to interface more efficiently, ask technical queries and analyse data & status.

Delivery capability

Benefit from effortless visibility and actionable insights delivered via Sightline. This provides real-time access to all returns, data inputs and escalations. With a holistic view across all compliance, you'll know your obligations are being managed effectively. Instant access to status updates and analytics empowers you to focus on higher-value, strategic activities.



Connected insights

Centralised data management

Standardised by process areas and increases quality and eliminates duplicate requests.

Integrated document management

With version control, gives everyone safe and secure access to the latest version of the tax returns, tax memos and insights e.g. legislative updates.

Collaboration features

Visualise your project, company status, milestones, deliverables, tasks, reporting, documents and KPIs all in one place.

User experience and adoption

Daily digest and views tailored to individuals' responsibilities. Global use mandated across our network, meaning information is up to date and user adoption levels are high.

Cloud-based architecture

Connected compliance is always evolving and you will be the beneficiary of these evolutions, with regular updates via our cloud-based solution.

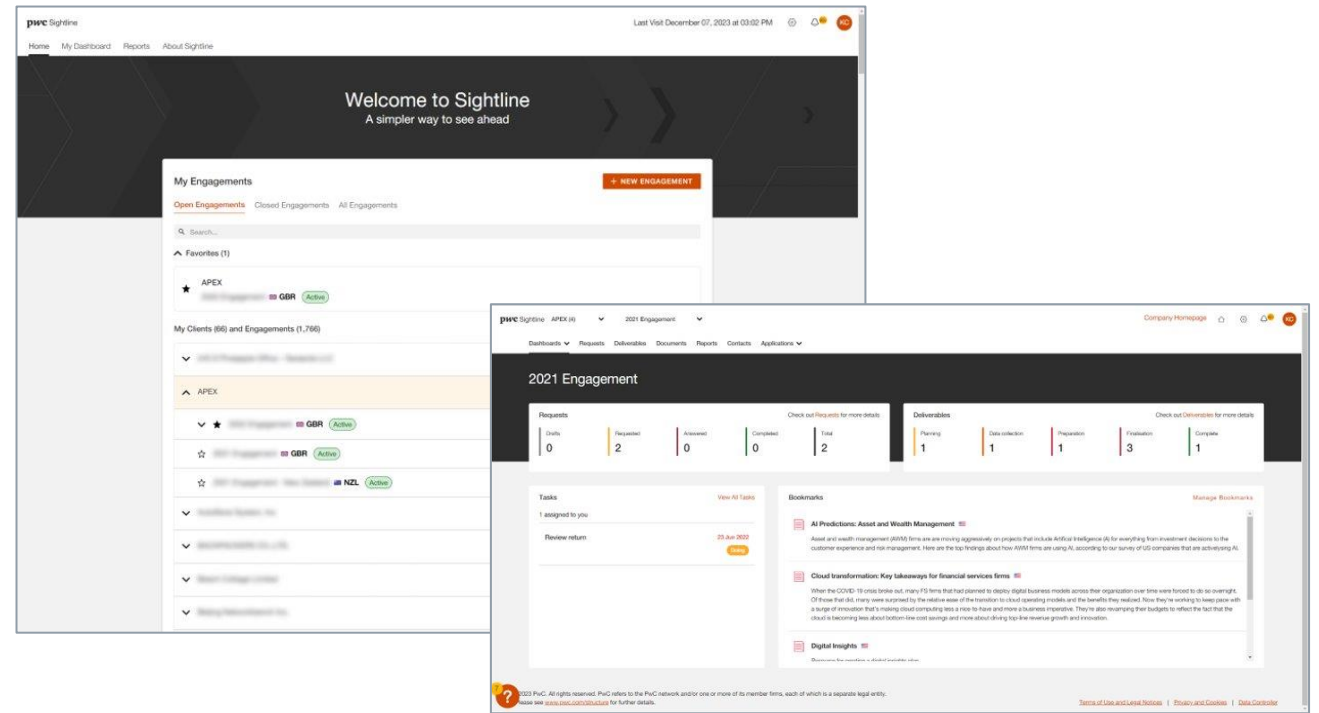


The bottom line

Centralising milestone management and communication, reduces email traffic and operational noise. Sightline enables you to be able to step back from day-to-day delivery and only engage when necessary, resulting in clarity and efficiency.

One platform powers your entire project

Sightline is PwC's digitally enabled, web-based collaboration platform that provides a single, secure portal for all your Tax, Legal, and People projects—whether local or global. It offers 24/7 access to your financial data, compliance status, returns, reports, and our full suite of technologies.



Dashboards

Turn data into decisions with dynamic dashboards — automated reporting and visualizations give you instant clarity, so you spend less time searching and more time leading.



Documents:

Access everything in one place. A secure, centralized hub for all engagement documents ensures efficiency and peace of mind.



Requests:

Simplify collaboration. Standardize data collection and eliminate email clutter by managing all requests in a single, streamlined platform.



Deliverables:

Stay in control. Track activities, deadlines, and responsibilities with a light-touch tool that keeps your project moving forward—every stage, every milestone



Reports & Analytics:

Unlock real-time insights. Automated reports and analytics put actionable intelligence at your fingertips, saving time and driving smarter decisions.

A collaborative platform, built to adapt to your needs

By investing in advanced technologies and continuously developing the digital expertise of our people, we deliver measurable benefits for you—greater efficiency, enhanced transparency, and time savings. These innovations unlock deeper insights that drive superior quality and create additional value throughout your engagement.



Progress Oversight

The clarity advantage

My Dashboard on Sightline gives leaders a real-time, consolidated view of progress across global workstreams. It centralizes deliverables and tasks, providing clear visibility into deadlines, responsibilities, and status. This streamlined perspective enables faster decisions, proactive issue management, and ensures alignment across every stage of delivery.



Harnessing Data

The data difference

Every data point has a story. With future-ready digital skills and a powerful Data Platform designed to collect and transform information, we reveal those stories from every angle—unlocking smarter insights and new ways to make your data work harder for you.



Analytics and Apps

The analytics edge

We don't just put your data to work—we activate powerful analytics and insights. By investing in advanced technology and digital expertise, we unlock the right intelligence to help you move forward with confidence.

Sightline

Where we collaborate and stay connected with our clients

Dashboards

Documents

Requests

Deliverables

Reports & Analytics

Data Platform

Where data is managed, transformed and used by our Tax apps

Key Benefits for you



Preparing with future-ready teams

- Work with digitally upskilled professionals
- Embed innovative solutions



Providing intelligent insights

- Spotlight potential risks earlier
- Visualise progress
- Make the most of your data



Enabling consistency

- Work with a global approach that is easy to follow
- Save time with one data request
- Work with one platform



Building trust through transparency

- Be confident in PwC's expertise
- Focus on high-value items because PwC has compliance under control
- See transparently into everything PwC does
- Reduce risk



Delivering sustained outcomes

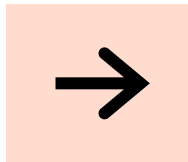
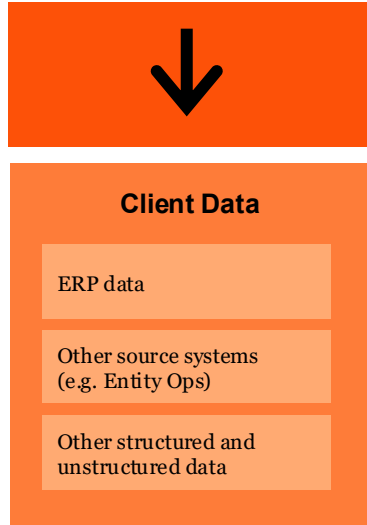
- Receive high-quality work from every in-scope territory
- One approach, one platform = high quality
- Work with better data to reduce errors
- Automate to remove manual errors



Tax ecosystem

Connected eco-system

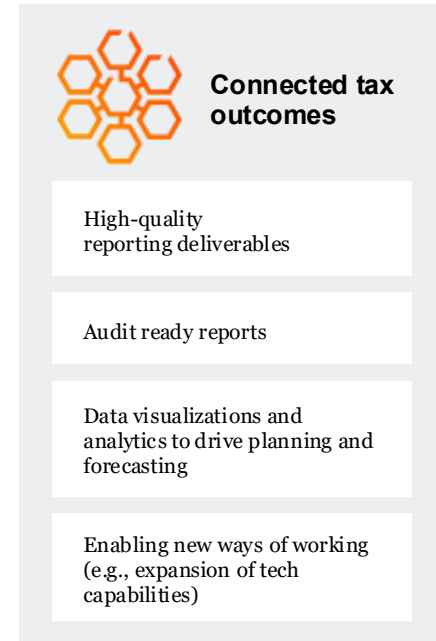
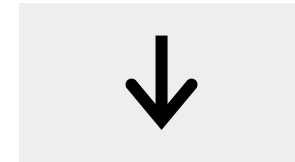
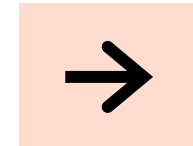
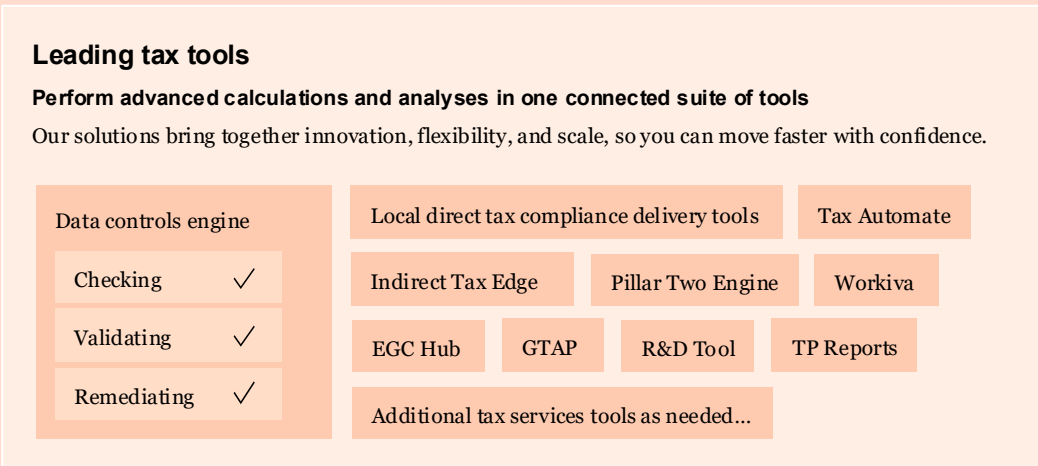
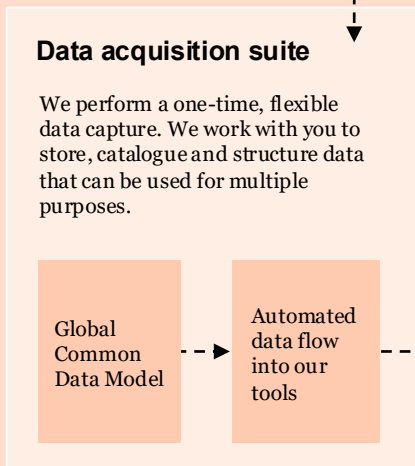
PwC's technology supports you end-to-end from data acquisition to filing.



Sightline.

One Connected Tax Technology Platform

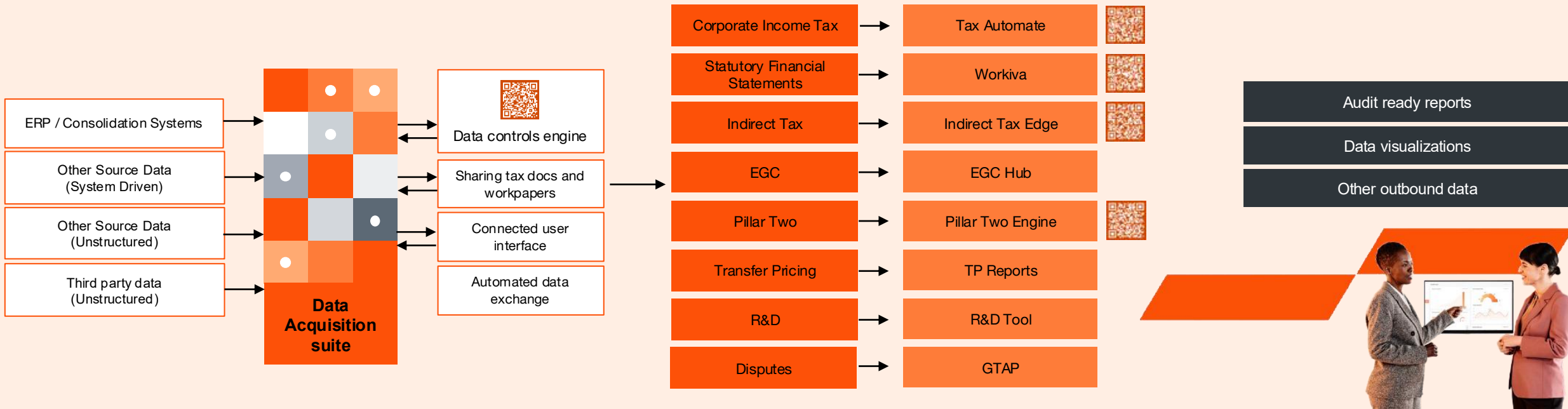
Integrated workflow, data gathering, collaboration, progress reporting, governance and control dashboards and analytics.



Connected eco-system



One Connected Technology Platform:
Sightline tax ecosystem



Gather

One-time, flexible data capture for multiple purposes. Reducing up to 80% of time taken, with minimal input from your team.

Transform

Standardizing and enriching data through our common data model and making data available throughout the process

Activate

Complex analysis and computations automate the reporting and planning experience

Experience

Results, insights, and analytics customized to our clients' needs and delivered with a better user experience through Sightline

2

Core capabilities

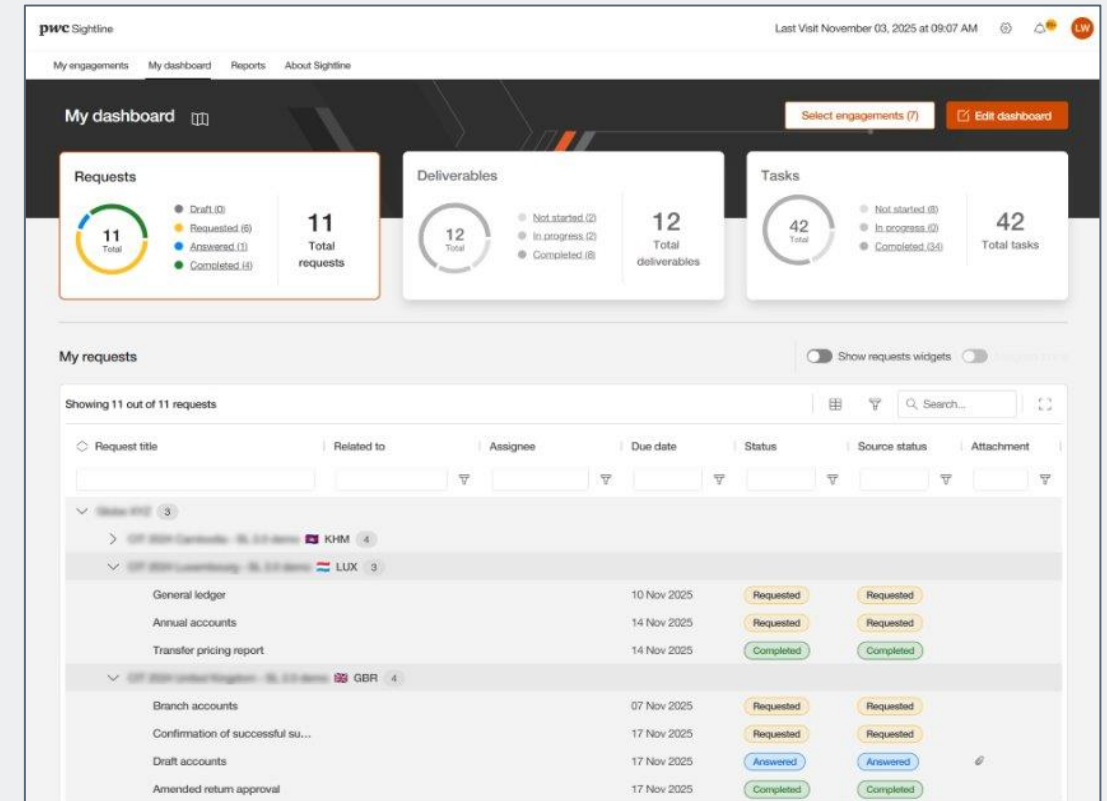
My Dashboard

My Dashboard provides valuable insights about the status of your engagements from all of your Sightline engagements in one place. Including content from the Global and US experiences, which is available to PwC and Client team members.

My Dashboard summarizes data from every engagement a team member has access to.

Real-time, interactive visuals provide team members with the most important information they need, and include links to their engagements when they need more details, to take action and determine next steps.

Depending on the needs of a project different engagement teams may utilise a variety of apps. 'My Dashboard' aggregates data from all apps and standardises their information to achieve a single, cohesive, view. Since some apps perform similar functions, their data is presented together in a single widget and table.



Key benefits

- All Engagements:** Data from all engagements is displayed on My Dashboard, so you can spend less time navigating between engagements to know how they are progressing.
- Real Time:** My Dashboard updates frequently to provide the most accurate snapshot of your engagements.
- Personalised:** Customise which global status widgets appear on your My Dashboard and the layout on-screen.

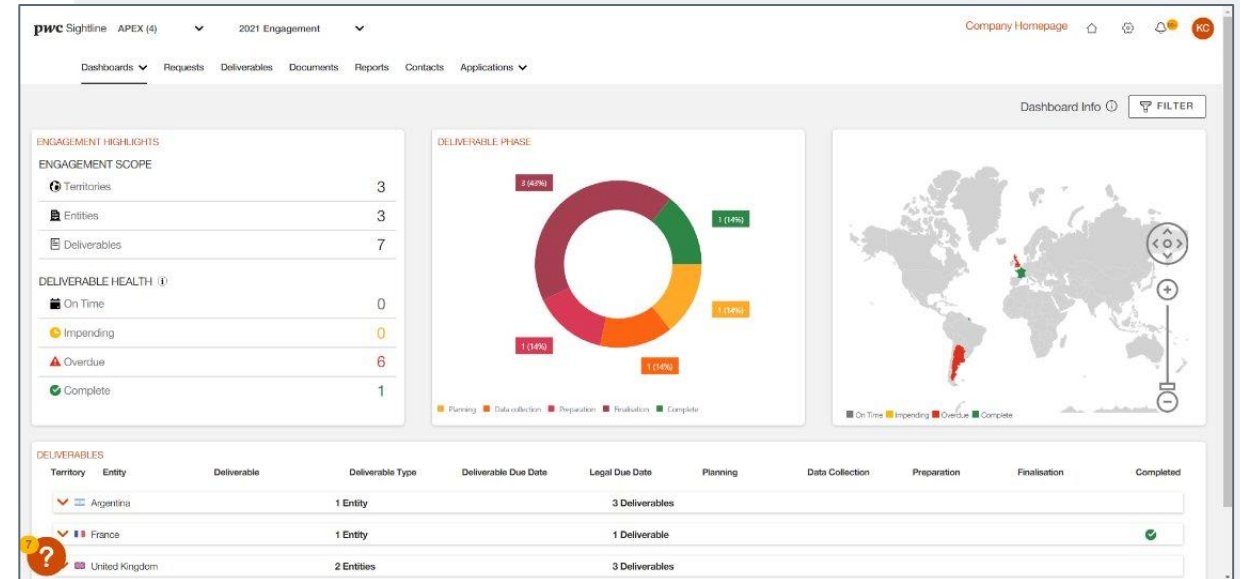
Dashboards

Dashboards provide a portfolio view of all projects, ensuring greater transparency. Maintain central control over your engagements with interactive visuals that summarise progress in a deliverables-centric view.

Dashboards collect a portfolio of your work in one place, centralising the engagement delivery process and providing you with unprecedented transparency.

Interactive visuals summarise engagement progress and enable teams to focus on a selection of deliverables. More details are a click away in our apps, which are built flexibly to accommodate a variety of services.

Dashboards standardise information to support you in making informed decisions and effectively manage global service delivery.



Key benefits:

Transparency:

A portfolio view of your work in a single location, centralising engagement service delivery.

Real time:

Access engagement updates and status information any time of day.

Interactive:

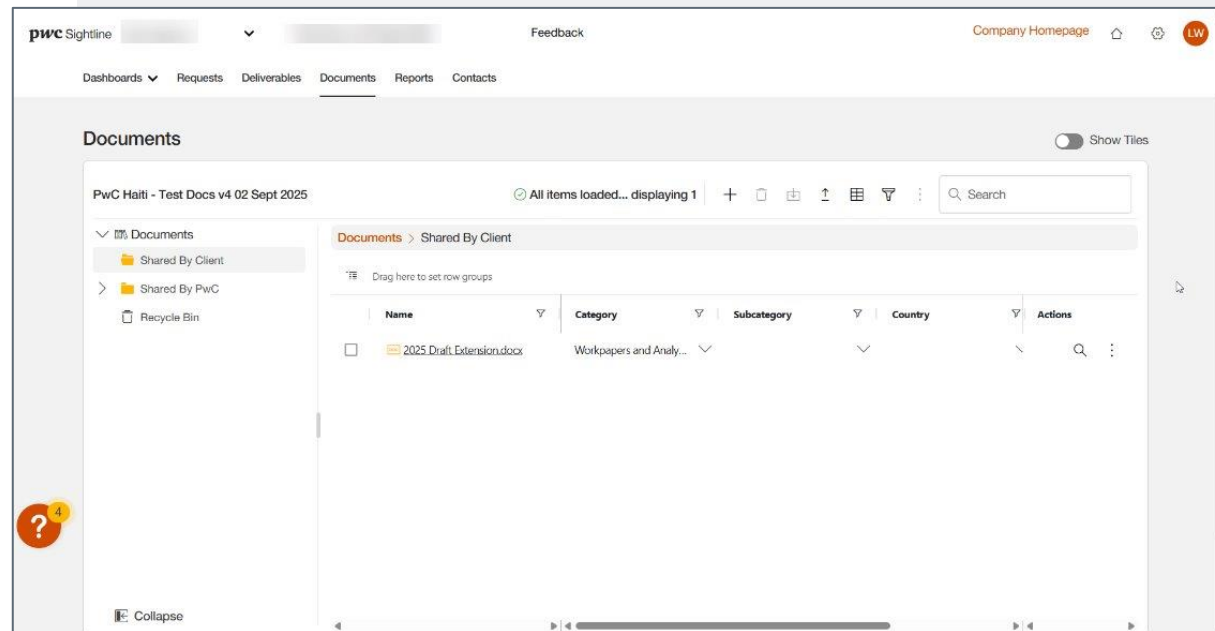
Focus on a selection of deliverables with interactive visuals and filter options.

Documents

Documents provides a consistent, safe and secure way teams to exchange project-related files so that all members of the team have a single point of reference for documents – with access to shared documents no matter where you are located.

Documents provides you with a simple and consistent user experience when exchanging documents with the client, allowing everyone working on a project to:

- Access, upload and download documents directly from your computer anywhere in the world using a simple browser interface.
- Securely store documents in a central, encrypted SharePoint location for the duration of the engagement.
- Collaborate seamlessly by sharing documents with colleagues and PwC project team members.
- Tag files with metadata (e.g., Country, Document Category) to enable efficient grouping, searching, and permission management.
- Centralise engagement content so all documents are in one place, regardless of how they were received (e.g., files sent via Requests automatically upload to Docs4).
- Use a consistent solution across both local and multi-territory engagements.
- Download documents in bulk for speed and efficiency when needed.
- Integrate with your organisation's technology through a flexible framework, enabling sustainable exchange between your local document management system (DMS) and SharePoint Docs4.



Key benefits:

- | | |
|-----------------------|--|
| Collaboration: | A consistent, safe, and secure way for you to provide client teams with project-related documents and files. |
| Efficiency: | Eliminate the need to exchange documents via email, thereby reducing the associated risk. |
| Secure: | An encrypted and centralised location to organise documents and manage version control while maintaining information security. |

Requests

Requests eliminates the need to exchange sensitive information over email by providing a secure space for PwC and Client teams to communicate with each other. Request or send information, upload documents, and follow up on queries directly in Requests.

You can supply engagement data or ask your client team a question by sending a simple message via Requests. The data collection process is simplified by providing pre-made questionnaires and templates to collect data from you and members of your team.

Follow up on important information with the simple click of a button and assign information requests to the relevant team member for speedy response.

Requests empowers teams to centralise the data collection process by:

- Eliminating email as a vehicle for collecting data
- Offering complete transparency of communication status
- Providing real time visibility into the status of outstanding information
- Collecting all data, communications and files in a central and secure location for access by all engagement team members.

Requests has all of the benefits of email, but with greater protection, organisation and transparency. PwC are committed to protecting your information while providing a real time understanding of what is happening within your engagement.

As part of the Sightline platform, any documents exchanged within Requests will upload directly to Documents.

The screenshot shows the 'Requests' interface. At the top, there are two tabs: 'INFORMATION REQUESTS' and 'QUERIES TO PwC'. Below the tabs is a summary bar with five columns: 'Total' (54), 'Drafts' (0), 'Requested' (30), 'Answered' (24), and 'Completed' (0). Below the summary bar is a search bar. The main part of the interface is a table with the following columns: 'ID', 'Title', 'Related To', 'Assigned To', 'Attachments', 'Due Date', and 'Status'. The table contains several rows of requests, each with a checkbox, an ID, a title, a related entity, an assigned team member, a due date, and a status (e.g., 'Requested', 'Answered').

ID	Title	Related To	Assigned To	Attachments	Due Date	Status
PR27	Management charges/Technical Fees	Holding Co. 1 CIT Return, Data Collection	Claire Doyle			Requested
PR137	Additions	This Engagement	Claire Doyle			Requested
PR147	Other Income	Demo Food Co.	Claire Doyle			Requested
PR114	Test data	Holding Co. 1 CIT Return, Data Collection	Claire Doyle	EC Requests workshop - Activity Instructions.pdf		Answered
PR118	Receipts	Demo Food Co.	Claire Doyle			Requested
PR120	Partner K-1 Information	Demo Drinks Co.				Requested
PR3	Test 3	Holding Co. 1 CIT Return, Data Collection				Answered
PR29	Accrued Insurance	Demo Drinks Co.				Requested

Key benefits:

Reduced email: Move engagement information out of your inbox by communicating with the team directly within Sightline..

Transparency: Stay up to date with information requests and queries on the Requests status page, whatever the geographical origin of the request.

Increased efficiency: Increased efficiency of exchanges and communications with a simpler, more collaborative mechanism for requesting and sharing information.

Secure PwC values your protection and security. Exchange sensitive information in Requests knowing data security and confidentiality are of paramount importance to us.

Deliverables

Deliverables is a user-centric application designed to help you monitor the evolution of a project through its different stages. Value driven and logical, Deliverables approaches project management in a new, simplified way.

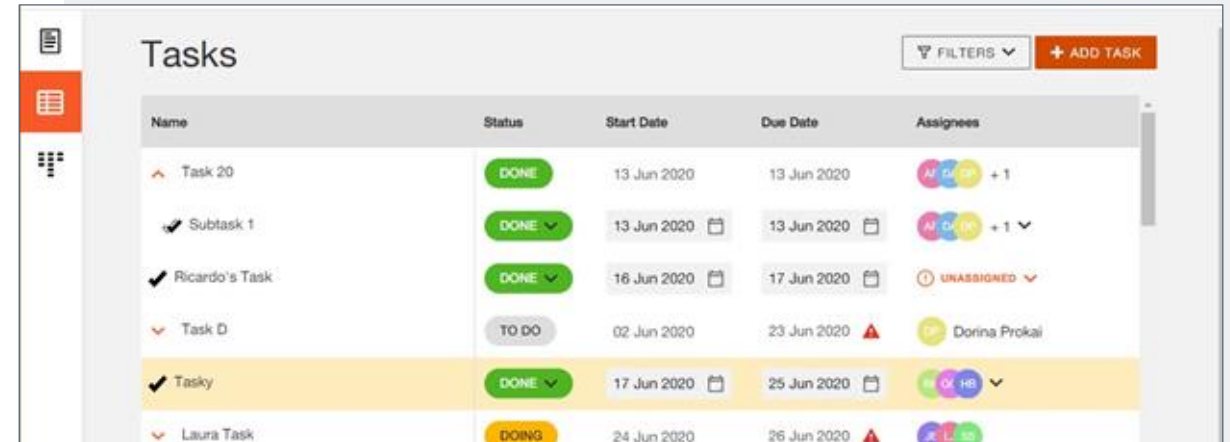
Deliverables is an intuitive and transparent engagement management app that manages the lifecycle of deliverables on a project while providing real-time insight into the status of work.

Deliverables presents engagements by reference to standardised phases (planning, data collection, preparation and finalisation) so status is communicated in a consistent way across all territories involved in a project.

View and manage data through three different lenses to explore high-level to granular engagement progress while maintaining a clear understanding of roles and responsibilities.

Designed for transparency and simplicity, Deliverables offers you the following advantages:

- Intuitive application – easy to use and simple to modify
- A reliable space to manage projects in a transparent and collaborative way
- Portfolio management to support timely reporting
- View project status anytime



Name	Status	Start Date	Due Date	Assignees
Task 20	DONE	13 Jun 2020	13 Jun 2020	AJ, GK, TP +1
Subtask 1	DONE	13 Jun 2020	13 Jun 2020	AJ, GK, TP +1
Ricardo's Task	DONE	16 Jun 2020	17 Jun 2020	UNASSIGNED
Task D	TO DO	02 Jun 2020	23 Jun 2020	Dorina Prokai
Tasky	DONE	17 Jun 2020	25 Jun 2020	OK, HB
Laura Task	DOING	24 Jun 2020	26 Jun 2020	X, L, SE

Key benefits:

- | | |
|---------------------------|--|
| Transparent: | Real-time access to the status of deliverables and engagements wherever you are geographically located. |
| Intuitive: | User-centric interface - so that you can accomplish your activities easily and efficiently. |
| Simple Navigation: | Less is more! Every element of the page has been placed with your usability in mind, giving ample space to text fields, icons and buttons. |

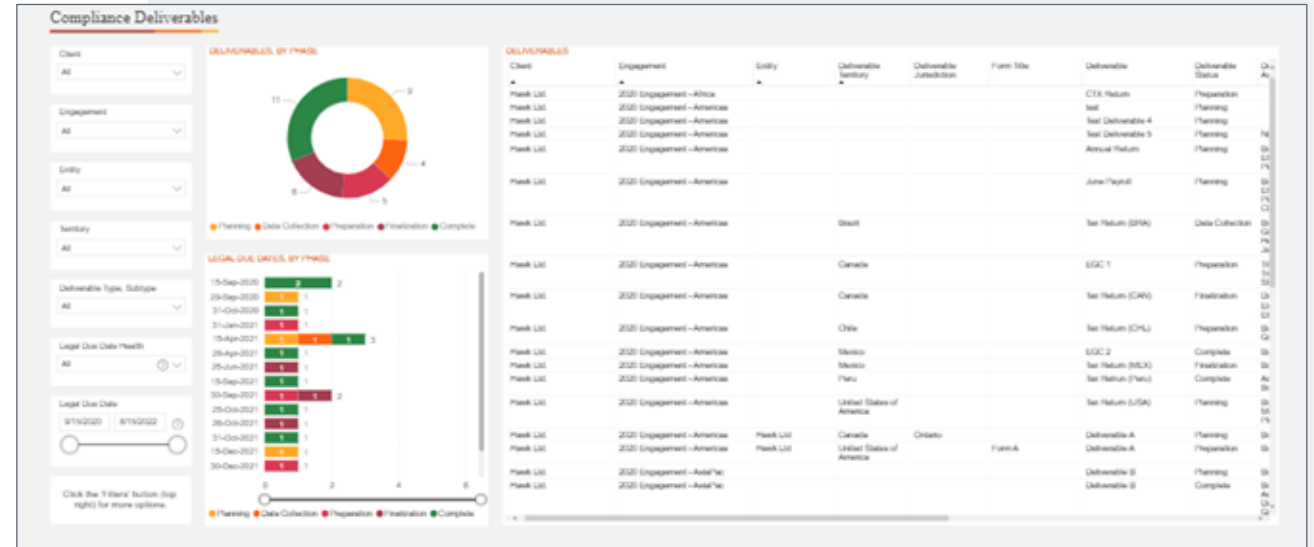
Reports and Analytics

Sightline Reports leverage advanced analytics to create new insights and provide real-time status about your engagements, to afford you more time to focus on managing your business.

Reports visualise up-to-date engagement data and identify valuable insights, covering a wide range of needs from summarised information through to the small details that contribute to a successful project.

As your team makes progress across your project, the corresponding reports update automatically in real-time.

Your team will prepare a portfolio of reports for the engagement - but you can also ask your team to create a custom report that focuses on a particular data set.



Key benefits:

Transparency:

Updates are processed in real-time, providing you and your client team with the most up to date information.

Efficiency:

Access the data you need with our ready-to-use standard reports

Insights:

We produces reports based on the client's data and surfaces them to you. You can also see the data visualised in a different way or hone in on a particular area.

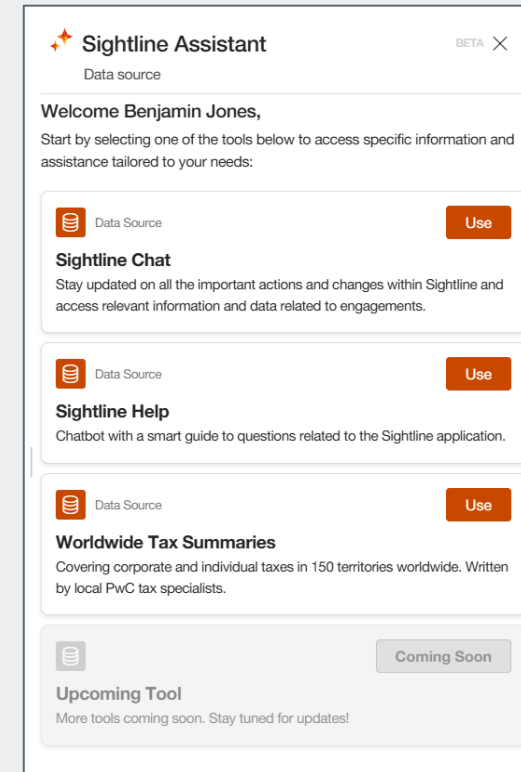
Embedded AI capability

Sightline AI Assistant

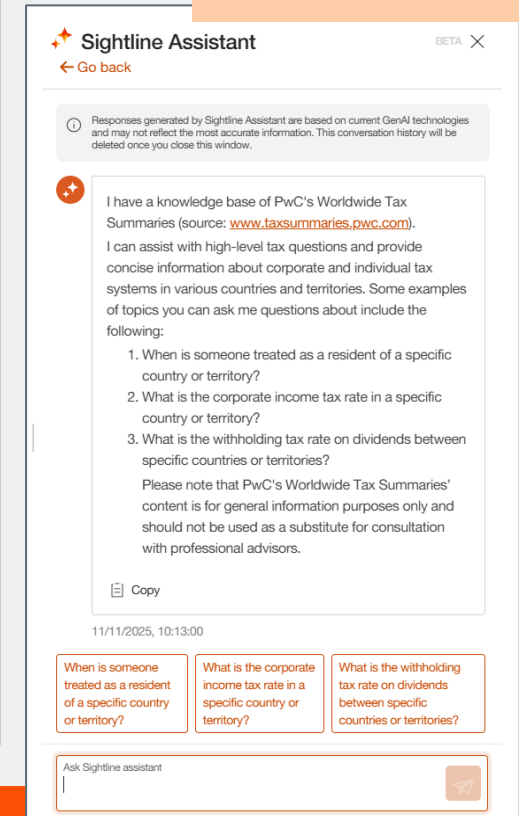
Sightline AI Assistant is an intelligent, conversational tool embedded within the Sightline platform, designed to transform how you access and interact with your engagement data.

Instead of navigating complex dashboards or searching through multiple sources, you can simply ask questions in natural language and receive accurate, context-aware answers instantly.

Whether you need to check the status of deliverables, explore tax guidance, or analyse engagement trends, the Assistant provides real-time insights that are tailored to your business context - dates, territories, and practice areas - helping you make informed decisions faster.



Internal only presently



Key benefits:

Smarter decisions:

Access accurate, context-rich information to support informed decision-making.

Enhanced productivity

Free up your team to concentrate on high-value activities rather than data hunting.

Improved client experience

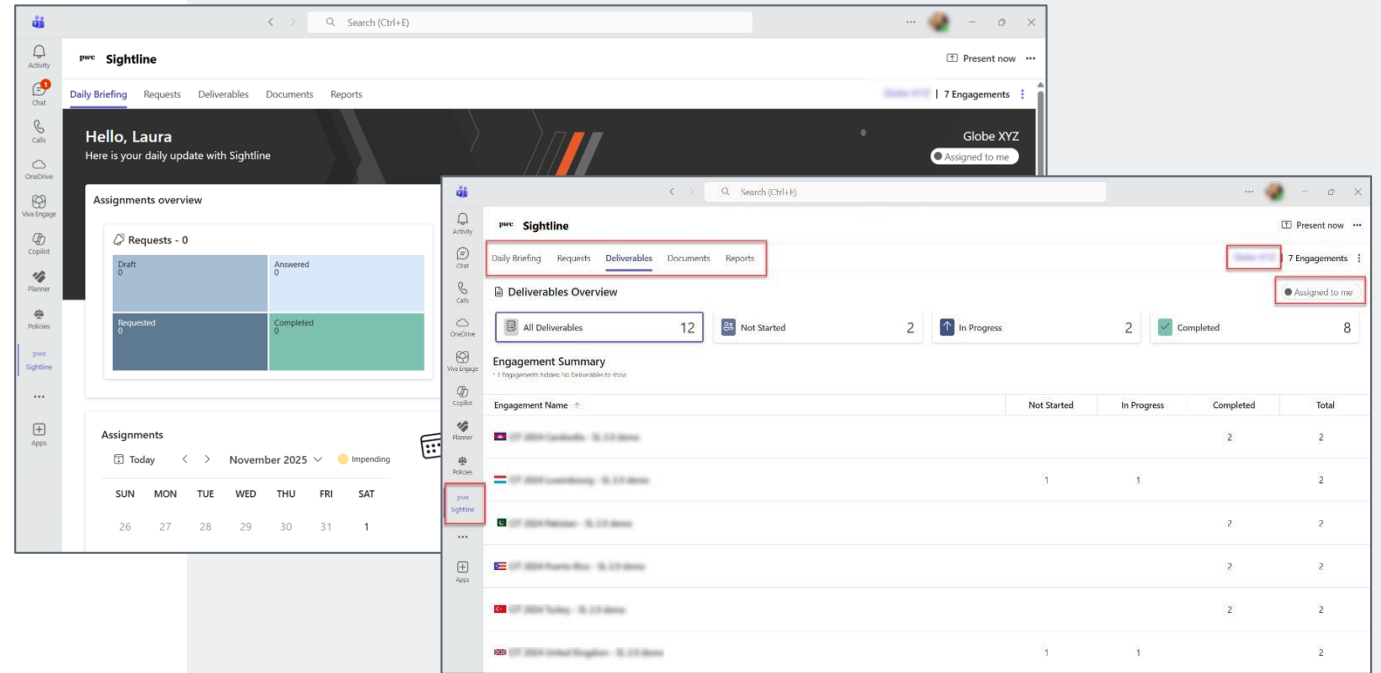
Deliver faster analysis and actionable insights for a seamless engagement journey.

Sightline for Teams

Sightline for Teams is now live and available for download on the Microsoft Public Marketplace. Sightline for Teams allows you to view the key features of your Sightline engagement on your mobile device through the Teams app.

Sightline for Teams brings the power of PwC's Sightline platform directly into Microsoft Teams—now optimized for mobile. Enjoy familiar collaboration tools alongside industry-leading engagement management, whether at your desk or on the go. Available for download on the Microsoft Public Marketplace, Sightline for Teams streamlines workflows and enhances productivity from any device.

Tax engagement teams can work smarter, faster, and together—anytime, anywhere. Sightline for Teams isn't just a companion to the web version—it's a game-changer for service delivery and operational efficiency, now with full mobile compatibility. Access requests, deliverables, documents, and reports right from a mobile device, keeping teams connected and responsive wherever business happens.



Key benefits:

Unified experience:

Access all your Sightline engagements right inside Teams from your desktop or mobile device.

Effortless integration

Seamlessly manage requests, deliverables, tasks, documents, and reports without switching platforms. Collaborate instantly with your team and clients, reducing email clutter and keeping everyone in sync.

Easy access

Download and get started in minutes—no complex setup required.

3

Security

Information Security Approach and Governance

Note to Proposal Team:

The Sightline Security Statement (found [HERE](#)) can also be shared with clients; however, it is only accessible through a PwC internal link and thus, must be downloaded to be sent to clients.





Thank you

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