tangelo

Case Study

How PEXA Reduced Reporting Time by More Than 25%

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Case Details

Customer:
PEXA, Australia

Industry:
Property Technology

Organization:
ASX-listed company

Primary use case:
Financial and corporate reporting

Key reports:
Annual Report, Half-Year Report and corporate reporting outputs

Solution:
Tangelo Report

Customer Story

As PEXA continued to grow as a listed company, its reporting requirements became increasingly complex. Preparing financial reports involved multiple contributors, disconnected processes and significant manual effort to keep information aligned across different reporting outputs.

To support a more efficient and controlled reporting process, PEXA implemented Tangelo Report, creating a connected reporting environment that improves collaboration, strengthens data integrity and reduces manual work.

Results at a Glance

- Over 25% reduction in reporting time
- One trusted source for reporting data
- Automatic updates across multiple reports
- Improved version control and collaboration
- Greater confidence in reporting accuracy
- Less manual work for finance teams
- A scalable reporting process that supports future growth

Customer Q&A

Grant Lingwood-Smith
Group Financial Controller
PEXA

What reporting challenges were you trying to solve?

As our reporting obligations increased, it became harder to manage information across multiple documents and reporting cycles. We wanted to reduce manual work, improve version control and have greater confidence that everyone was working with the same information.

We encountered several hurdles - stale information, cumbersome version control, and inconsistent data, explains Grant Lingwood-Smith.

The biggest challenge wasn't preparing the reports themselves—it was maintaining consistency whenever data changed, without creating unnecessary review cycles and increasing the effort required to produce accurate reports.

Why did you choose Tangelo?

When we started evaluating solutions, we were looking for more than a document production tool. We wanted a platform that would simplify reporting, improve collaboration and remove the repetitive manual tasks that slowed our team down.

Our decision to move forward with Tangelo was influenced by someone who had used it at their previous employment, Grant recalls. Tangelo's demos quickly demonstrated its potential to streamline reporting. Implementation was smooth, aided by tailored training that addressed PEXA's specific needs.

We appreciated the real-time answers and immediate solutions. Dedicated support from a Client Manager and responsive helpdesk ensured the transition went off without a hitch. Most importantly, Tangelo created a central source of truth - one version of data across all reports.

Customer Q&A

How has Tangelo changed the way your team works?

One of the biggest improvements has been creating a single source of truth for our reporting data. Instead of updating information manually across multiple reports, changes now flow automatically throughout the reporting process.

Tangelo has completely transformed our reporting process. With real-time updates, seamless version control, and enhanced data integrity, we've significantly reduced manual work and increased confidence in our reports. The time savings—over 25%—have been a game-changer for us. For any organization facing reporting challenges, Tangelo is a must-have.

What impact has Tangelo had on reporting quality?

The improvements go beyond efficiency. By reducing manual work and improving data integrity, Tangelo has strengthened the overall quality of our reporting. Our finance team now spends less time checking data consistency and more time reviewing the information that matters.

Reporting is more controlled, transparent, and far less dependent on manual intervention.

What advice would you give to organisations facing similar reporting challenges?

Implementing Tangelo has changed how we approach reporting. It has simplified collaboration, improved confidence in our data, and created a process that can better support future growth.

For organisations modernising financial reporting, one connected platform can make a real difference in efficiency, governance, confidence, and reporting quality.

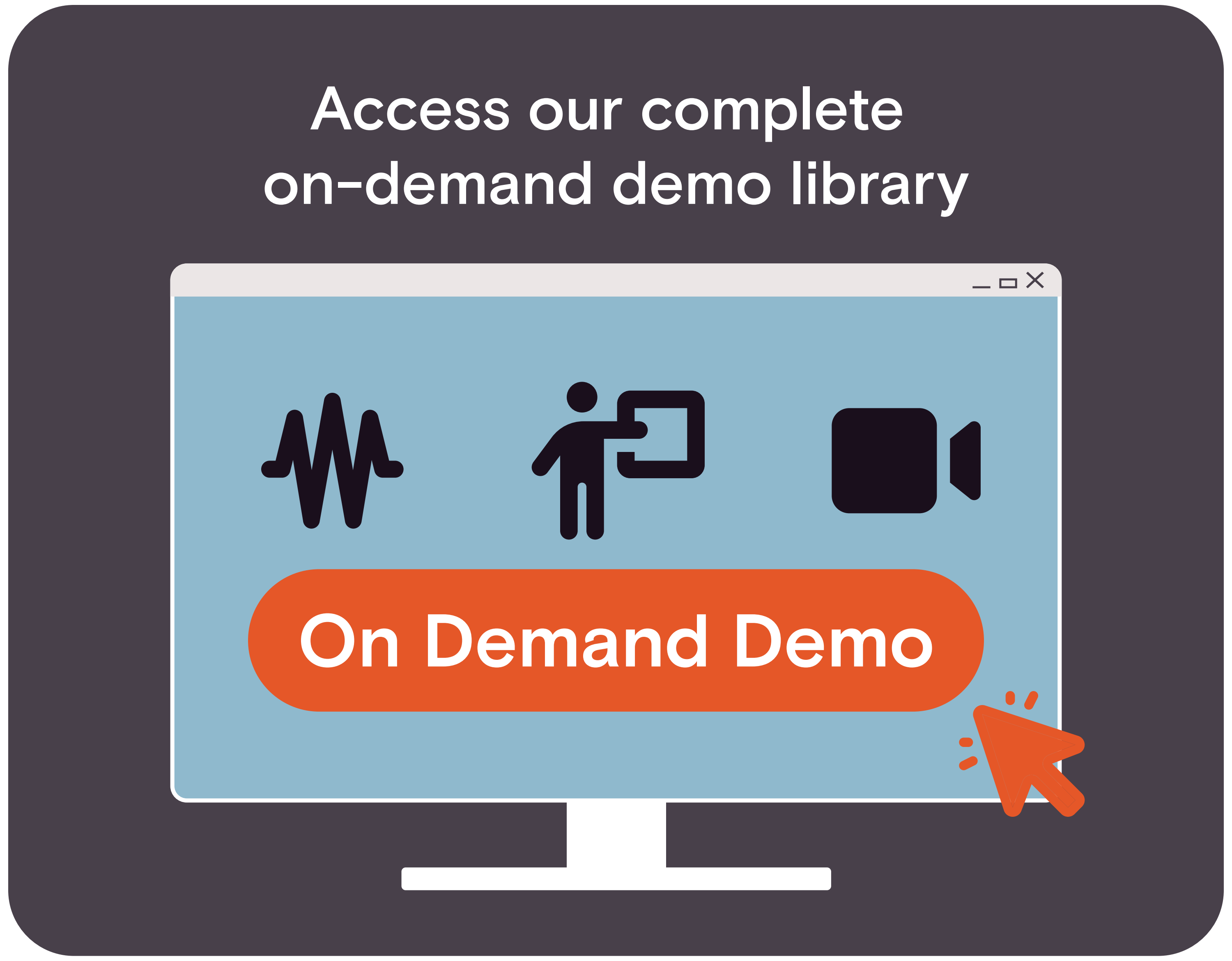
What comes next?

Following the success of its first reporting projects with Tangelo, PEXA is continuing to expand the way it uses the platform across its corporate reporting cycle.

With Annual Report, Half-Year Report, and other key reporting outputs now supported in one connected environment, PEXA is well positioned to keep improving collaboration, strengthening data integrity, and reducing manual effort as its reporting needs evolve.

The focus now is on building on that foundation: making reporting faster, more consistent, and easier to manage across future reporting periods.

Links:



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