



The Kearney Group Achieves Greater Client Satisfaction with DocuSign

Established in 1986, the Kearney Group began providing specialist accounting, taxation and strategic business advice. Today, the company also offers complementary business bookkeeping, holistic financial planning services, debt finance support and strategic investment advice.

The practice was founded on the belief that 'one-size-fits-all' financial advice often falls short of a client's needs and that in order to provide the most effective service, it is necessary to work with clients to build custom solutions. As a company constantly on the lookout to improve the client experience, the Kearney Group sought a e-signature solution that would be both user-friendly and integrate well with the financial firm's complex business systems. With the assistance of DocuSign, the Kearney Group has crafted a fully integrated custom package that is driving the desired impact with both the business and its clients alike.

The need for an agreement process that kept up with the speed of business

Like others in heavily paper-based industries, the Kearney Group found that document exchange, signature and compliance processes slowed as volume increased in their growing business. In looking for a digital solution to automate and streamline its paper-based processes, security and time-sensitivity were also major concerns for the Group, which handles complex financial documents and deals with clients around the world. In addition, the Kearney Group wanted a solution that could integrate well with their custom-designed MyKearney Online web portal in an effort to further enhance the client experience.

A secure and fully integrated solution

After investigating a range of e-signature providers, the Kearney Group ultimately selected DocuSign due to the company's impressive security résumé, the technology's user-friendly interface and the product's seamless API integration. Collectively these aspects allowed the Kearney Group to customise a solution that would meet its business needs and respect its overarching brand.

Results



Accelerated signature process from several weeks to 78% of documents signed in just one week



Strengthened document security with fully integrated API



Enhanced web portal experience for clients



Overwhelmingly positive client feedback

Reduction in document turnaround time makes for satisfied employees and clients

The integration and development process first began by familiarizing Kearney Group advisers to eSignature technology generally, and DocuSign specifically. Next came integrating DocuSign with the company's complex internal systems including the MyKearney Online web portal. With API integration complete, the first signatures started rolling in through the portal, along with overwhelmingly positive client feedback.

"I am a long-standing client of the Kearney Group and recently started signing documents using DocuSign," said David O'Farrell, partner of HWL Ebsworth Lawyers, in Brisbane QLD. "I was surprised and pleased by the process. I don't claim to be technically competent, but found the prompts very simple and intuitive. DocuSign has saved me a lot of time." DocuSign enabled the Kearney Group to speed up processes and eliminate the waste, costs and hassles of using paper. Most critically, the smooth and streamlined integration of DocuSign has allowed for a pleasing client experience that is fast and efficient.

"Integrating DocuSign into MyKearney Online has been a game changer for the Kearney Group," said Paul Kearney, Chief Executive Officer at the Kearney Group. "It's enabled us to provide our clients a better service experience and end product, sped up our internal processes and freed us from a mountain of paper."

Historically, Kearney Group advisers could wait up to several weeks for the return of signed documents that had been printed and posted to clients. Following the rollout of DocuSign 44% are signed within 48 hours, and 78% of all documents are signed within a week. DocuSign has dramatically reduced the amount of time to process documents while driving client satisfaction along the way.

"As an organization that constantly strives for innovative solutions, there is no doubt that building MyKearney Online tightly integrated with DocuSign was the right decision," said James Lewis, Business Systems Development Manager at the Kearney Group. "The result is something that has truly differentiated us from other financial services firms."

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About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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