

William Buck Victoria differentiates with digital-first experience

DocuSign supports fast and frictionless client service

Company's Top Objective

William Buck has been helping clients achieve their dreams for more than 120 years. The leading firm of Chartered Accountants and advisors has over 90 directors and 500 professional staff working across Australia and New Zealand. Its philosophy of 'changing lives' drives it to constantly seek new ways to create positive change for clients, employees and the wider community.

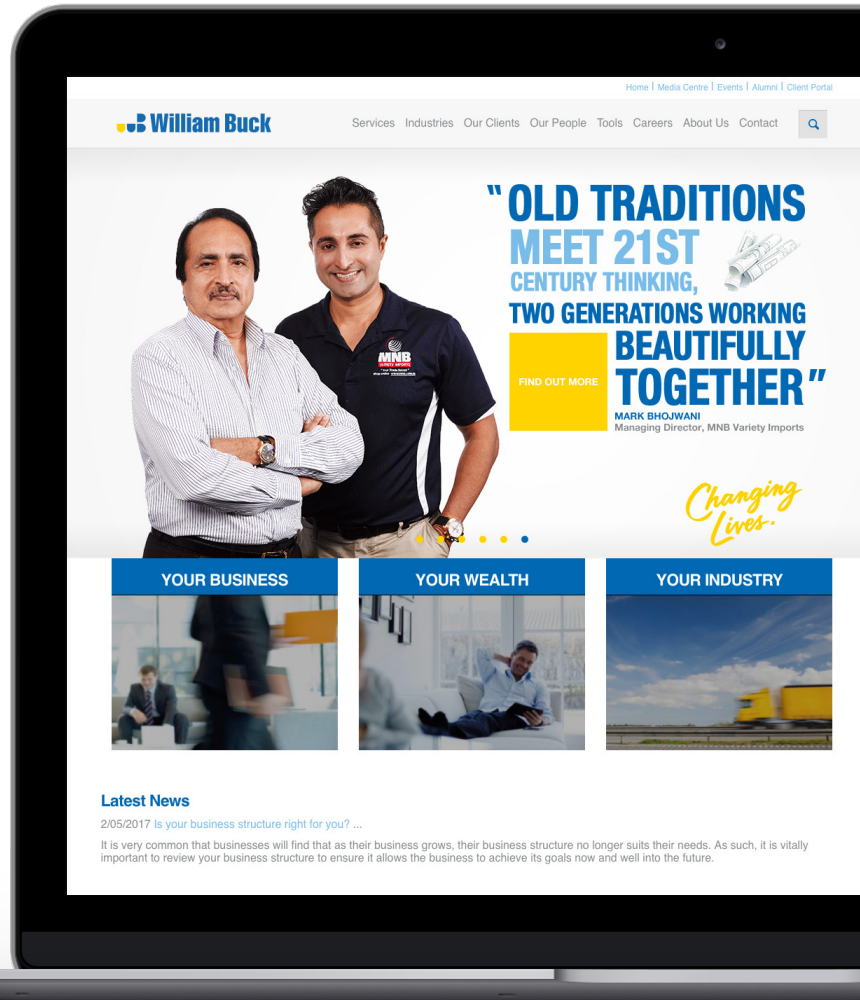
It's this innovation that helps William Buck Victoria and others in the network provide exceptional service and differentiate itself in a competitive market.

Business Challenge

William Buck Victoria's clients are increasingly tech-savvy. And like everyone today, they want to do business in the most efficient, cost-effective way. In this environment, the firm sought to create a digital-first experience that would delight clients and help maintain its competitive edge.

Lalitha Koya, IT Manager at William Buck Victoria said the move to digital was a client-driven change.

"We have clients of all ages who want to transact digitally wherever possible. This forced us to think about what we could do differently to digitise our processes and sustain the business for the long term."



Results achieved:

- ✓ A digital-first client experience that builds competitive advantage
- ✓ Clients enjoy the convenience of signing returns from anywhere while knowing their information is secure
- ✓ 50% of individual tax returns are signed and returned within 24 hours
- ✓ Time to complete and lodge tax returns has been slashed from one week to one day
- ✓ Employees freed from admin to focus on client service

Spending more quality time with clients and making it easier for them to transact were the key goals for the client-focused firm. Re-hauling its tax return process and swapping physical signatures for electronic ones would help it achieve both.

The Resolution

William Buck Victoria is now using DocuSign's eSignature platform for sign-off on client tax returns. It's one of many cloud services the firm is now using to drive a better client experience.

DocuSign has been integrated into intapp workflow management software for a fully digitised process. Local support from DocuSign was instrumental in a fast and agile implementation.

The Key Benefits

Supported by DocuSign, William Buck Victoria has made the tax return process much more convenient for clients. Employees no longer need to print ten-plus page returns, paste on the 'sign here' stickers and send them out by courier to be signed. Nor does the client need to contend with the hassle of scanning or posting it back.

This process — which took at least a week — is now seamless for clients and employees. Returns are sent and signed digitally using DocuSign, and more than 50% are returned within the first 24 hours. They can then be lodged with the ATO on the very same day. So clients not only enjoy the convenience of being able to sign their return from their computer or their phone, they can receive tax refunds more quickly.

Employees are also freed from the admin of manually processing returns and chasing signatures. They can go into DocuSign and see at a glance which clients have reviewed their returns and which have already signed. The simple and

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– Lalitha Koya, IT Manager at William Buck Victoria

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standardised process reduces risk and frees employees to spend more quality time with clients. It also makes it easier to maintain and search through client returns.

An initial trial of the digital process was so successful that it has become business as usual. Each and every individual income tax return is now executed through DocuSign. William Buck Victoria is also planning to use DocuSign to streamline contracts and forms for superannuation.

Koya said that the improved client experience helped it to gain critical advantage in a crowded marketplace. "There are a lot of accounting firms out there and all kinds of apps. We can't differentiate just by doing things faster. What we can do is lead by innovation and offer an experience that's digital and frictionless all the way through. Technologies like DocuSign help us to do that."



About DocuSign

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For APAC enquiries: phone +61 2 9392 1998 | email: apac@docusign.com | docusign.com.au

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