Occupational Health Assessment Improves Document Workflows with BoldSign



Introduction:

Occupational Health Assessment Ltd. is an organization that specializes in a highly regulated area of healthcare in the United Kingdom—occupational medicine. Its work includes certifying that its clients are medically fit for their roles, providing night worker health assessments, and mitigating occupational health risks. Magnus Kauders is the CEO and founder, and he describes the business as one that "punches above its weight," boasting a client roster that "reads like a who's who in the city of London."

Challenges:

Since Occupational Health Assessment Ltd. is a business operating in a highly regulated industry, Magnus and his team knew they needed an e-signature service that delivered top marks in security and regulatory compliance. Initially, he opted for PandaDoc, which he says worked for them for many years successfully. The company hit a point, however, when the solution began accruing more costs than seemed viable for their long-term financial goals.

"We are a small, focused business," Magnus said. "We have to be incredibly mindful about our systems, processes, and procedures to make sure we deliver on our promises to our clients."

Scaling with PandaDoc also proved a frustrating, expensive undertaking. "It just would have made the work we were doing uneconomic," he said. So, he began looking for alternatives and came across BoldSign®.

Solution:

Magnus knew that some platform websites can be misleading. "We can all build websites that paint a picture that says, 'actually, we're the most amazing business on the planet,' but you've got to be able to dig beneath the surface," he said. And dig he did, finding one of the features that drew him to choose BoldSign—the ability to test the platform in a sandbox setting before putting time, effort, and money into it. His CTO and the rest

Industry
Healthcare

Product used
BoldSign®

Region
United Kingdom

Use case
By adopting BoldSign, an eSignature solution from Syncfusion, Occupational Health Assessment Ltd streamlined document signing through seamless API integration, sandbox testing, and intuitive workflows. The result was faster processing, reduced complexity, and the confidence to scale operations without risk or unpredictable costs.

of the team got to play around with all of BoldSign's features, from integrations to a solid, user-friendly API. From the jump, they knew it was a better solution for them.

"It's been designed clearly so that people who are nontechnical can work with it in a very simple, straightforward manner," Magnus said. Like any new system, there were a few steps to learn, but once they got the basics, it was easy to work with.

Results

Now, as the team's workflows scale with the size of their business, they no longer have to tear their hair out at increasing document volumes. "Since making the move," Magnus said, "all of that has fallen away." He believes that they'll be able to scale up to 100 times their current workload without any risk, especially because of the responsiveness of the BoldSign support team.

"Quite often, you put in a request to a dev team and you're told 'it's on our road map, we'll look at it,' but... [you question] at what point is anything going to get done about this," Magnus said. But when he put in a suggestion for a new feature, the BoldSign team had an update ready for testing in about two weeks. "The request was listened to," he said. "It was worked on by the dev team, and when it came out, it worked from day one."

Since using BoldSign, Magnus and the Occupational Health Assessments Ltd. team have experienced:

- Powerful integrations with their favorite tools.
- An award-winning API that's easy to embed.
- A development team that truly listens to requests.

> "The service has been consistent and responsive from day one, and we're very, very happy with the support we've been given. It's flexible, incredibly responsive, incredibly supportive, and a really good value."
>
> **- Magnus Kauder, CEO, Occupational Health Assessment Ltd.**

Conclusion

BoldSign has transformed the way that Occupational Health Assessment Ltd. acquires e-signatures. Using BoldSign, they can efficiently collect the signatures they need to improve occupational health across the United Kingdom.

Want to learn more about BoldSign and try it out for yourself? Start a **free 30-day trial** today or **request a demo**.