BoldSign
By Syncfusion

Reduce Stress with Secure Document Sending and an Intuitive UI

Introduction:

Gwen, owner of Premier Tax and Accounting Group, was having trouble securely sending out documents to her clients during tax season for signature and receiving responses in a timely manner. Integrating BoldSign kept her documents confidential and significantly improved the efficiency of the signing process. Gwen went from needing to track down 65% of the documents she sent out to only two, thanks to the useability of the BoldSign interface.

Challenges:

Prior to using BoldSign , Gwen's biggest challenge was confidentially getting documents to clients for signature and review. She also had trouble keeping up with reminders to her clients and found the interface of the software she was using to be difficult to use. She couldn't revoke sent documents when changes were made, she found it hard to download signed documents, and it took a long time both to get the documents set up properly to send and to get them back from clients

Gwen was using DocuSign, one of the first e-signature software providers on the market. With it, she was sending documents by email, which seemed very insecure, and she had trouble finding help when she ran into issues. She also tried Google Docs to get tax documents reviewed, but not everyone was comfortable using it..

> Life with BoldSign is what's made my tax season so much smoother, I would say, on average, I would be chasing typically about 65% of my clients' documents. I am literally down to waiting on two documents from clients after using BoldSign"
>
> - Gwen

Industry
Finance

Product used
BoldSign

Region
United States

Use case
Send documents for review and signature during tax season.

Solution:

One day, a client happened to mention BoldSign to Gwen and sent her a link to the demo when she expressed interest. The demo was so impressive, that she signed up.

Results:

Gwen now sends out documents for signature with ease and receives them back much quicker. Her security problems were completely solved by BoldSign's methods. Her clients have noticed that the whole process is secure and timelier, giving them peace of mind. Gwen is most impressed with how efficient her workflows have become and how easy BoldSign's interface is to use.

96.92%

document tracking reduction (approx.)

100%

Security Enhancement

Gwen can easily revoke documents when needed and download them when the signature process is complete. She also sets up automatic reminders, so she doesn't have to keep track of whom to nudge for a signature again and when. She finds the validation feature useful, as it has prevented her from sending documents to two people with the same email address, and her customers like being able to jump to the next signature field in a long document.

"I would recommend BoldSign to any business owner, any company that needs to be able to transition documents from their company to the client for signature review," Gwen enthused. "I would recommend BoldSign to anyone and everyone."

As a business owner, seeing the consistent follow-ups of the BoldSign customer service team and knowing that they are easily accessible should she have questions is also a big part of her wanting to continue to do business with them.

> "I will continue to use BoldSign as long as BoldSign is available, I love using it"
>
> - Gwen

Future plans:

Gwen has recently started using BoldSign for contracts with clients, as well, and is very pleased with the results. She has plans to start exploring BoldSign's more advanced features. Soon, she will be revamping her website and will use BoldSign's automation features to link its web forms with her customer database in order to send documents.

Gwendolyn Gwen is also the treasurer of the NC Counts Coalition, which works with governments and communities to assess and eliminate barriers to an accurate census. The nonprofit also helps them understand and find solutions for issues impacting marginalized communities. This work has earned them a grant from the Bezos foundation, and Gwen intends to incorporate BoldSign to make their paperwork easier.

Conclusion:

If you are having trouble sending and getting back your documents for e-signature in a secure and timely manner, give BoldSign a try. As experienced by Gwendolyn Gwen, BoldSign is so easy to use that your documents can be sent faster and your clients won’t consider it a chore to complete them.

See how BoldSign can increase your efficiency by starting a free 30-day trial or Requesting a demo, the way Gwen did.