

OBK Create a Unique Customer Experience with DocuSign

Customer registration process reduced from days or weeks to within 12 hours

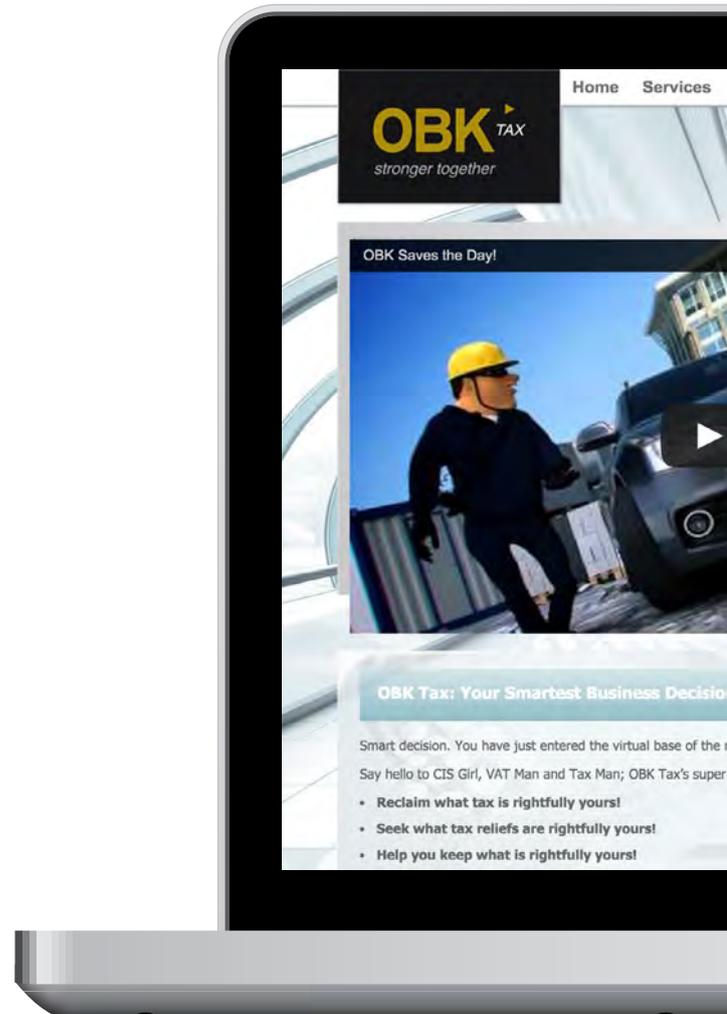
Company's Top Objectives

OBK LLP is an avant-garde accountancy practice as well as an approved HMRC tax agent based in Guildford. They are currently the sole UK providers of a unique financial product that allows OBK to create additional income streams to sole trader clients through an internet-based platform. They have spent the past 18 months developing the business and IT Systems to trade on a volume basis providing a business solution that will process up to 2000 plus reclaims a month.

Challenge

Due to OBK's rapid growth of new customers, they were looking for a way to increase efficiency as well as streamline their customer registration process.

OBK operate on mass market and are quite unique compared to traditional accounting practices. They have an internal telesales department, who focus on contacting potential clients to engage in their services. Previously, once a client had verbally agreed to take the service, the telesales agent used to post out a registration pack, which consisted of documents such as an engagement letter, questionnaire, letter for authority and client registration document, all requiring to be filled out manually which then needed to be returned. This was not only very expensive due to the postage and staff members time spent chasing and tracking documents, but delay in receiving the signed documents back and overall hassle to the client.



Top Benefits Achieved

- ✓ Improved customer experience as well as differentiating factor from competitors
- ✓ Customer registration process reduced from days or weeks to within 12 hours
- ✓ Efficiency has saved one head count per day

75% of the documents returned in the first day and 50% within the first 2 hours

The Resolution

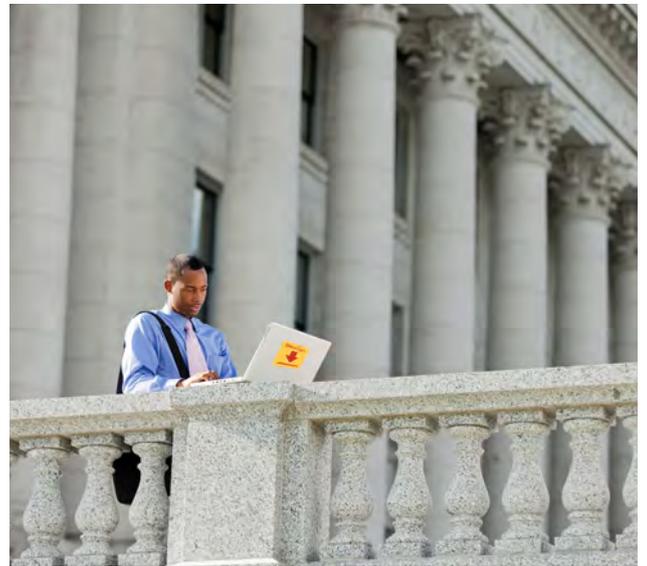
OBK quickly realised that incorporating electronic signatures into their organization, allowed them to not only reduced cost, speed up their processes but also stand out from the rest. DocuSign was the ideal solution to solve their challenge.

The Key Benefits

Since implementing DocuSign, OBK has seen significant results. The previously time-consuming process of sending and receiving client registration documentation has now been dramatically reduced, with 75% of the documents returned in the first day and 50% within the first 2 hours. This has also allowed the telesales agents to focus on new customers rather than paperwork.

Phillip Lockett-Colman, Head of Operations at OBK says, "DocuSign is very reliable and very robust. It has eliminated the cost and uncertainty of relying on Royal Mail and therefore increased the speed and efficiency of the client registration process. In addition, it saves each of our agents up to one hour a day, in reduced follow-up calls. Therefore with eight Telesales staff members it works out that by using DocuSign we are effectively adding an additional headcount."

Not only has DocuSign increased efficiency within the organisation but has also become a differentiating factor for OBK. Philip discusses how it has improved their customer experience "Most of our clients are able to use and navigate their smart phone, so they find DocuSign really intuitive and easier than signing paperwork. It's unique and adds to the customer experience".



"Our clients are able to use and navigate their smart phone, so they find DocuSign really intuitive and easier than signing paperwork. It's unique and adds to the customer experience"

Phillip Lockett-Colman,
Head of Operations

DocuSign | The Global Standard for Digital Transaction Management®



DocuSign, Inc. (DocuSign®), The Global Standard for Digital Transaction Management® helps organizations achieve their digital transformations for dramatic ROI, increased security and compliance, and better experiences for customers, partners, suppliers and employees. DocuSign automates manual, paper-based processes with the only open, independent, standards-based DTM platform for managing all aspects of documented business transactions. DocuSign empowers anyone to transact anything, anytime, anywhere, on any device securely.

For EMEA inquiries: 43 Worship Street, London EC2A, UK
phone +44 203 714 4800 | emea@docusign.com | docusign.co.uk