

Canny Group

Canny Group was still adjusting to their newly adopted Document and Practice Management System when COVID hit. Having to figure out how to quickly adapt to so many changes in a short period while maintaining high levels of service, implementing **FuseDocs** and **FuseSign**, and having the ability to integrate them with their new systems played a critical role in making the transition smooth and seamless.



BUSINESS SNAPSHOT

Client

Jamie Arrington, Divisional Manager,
Accounting.

Business

Canny Group

Located in Geelong, VIC, the Canny Group comprise of four divisions: Accounting, Legal, Financial Planning an NDIS Plan Management.

Business size

Two directors, 25 team members

Document Management System

FYI

Practice Management System

Xero Practice Manager

Technology solution

FuseDocs and **FuseSign**



IT'S AMAZING. IT'S REALLY FANTASTIC.

It produces a beautifully branded PDF for the client to review. We didn't have the ability to have bookmarks or a page of contents, for example, with the page numbers on it. But now we have it in two seconds.

Jamie Arrington, Manager
Canny Group



Canny Group

THE CHALLENGE

Jamie was with Canny Group for five years when she left for about six months. When she returned around the same time COVID hit, the business had moved to XPM and FYI.

With so many changes in such a short period and the need to quickly adapt to the new normal COVID had brought, Jamie and her team were faced with a bit of adjusting and refining their existing processes.

One of her many challenges was to figure out how they were going to send out the final tax returns and financial statements packs to their business clients. They were using another platform for packs for individual tax returns, but they didn't have a platform or process in place for business clients to create a professional package. The process was cumbersome:

“The way that we were getting that to work was, I was getting the work to review from

the accountants. I would then do my review, finish it off, and chat with Kryz and Mandy about the result. Then I would send an FYI task to our admin team, asking for the pack to be put together and the client to be called to make an appointment and explain they would need to create an account to sign the documents in this particular platform. It was a handful! We'd still post or print out everything that needed to be electronically signed.”

Jamie and her team would then save it all manually, and that was prone to error. Jamie also notes that there wasn't much flexibility either on how the packs were created and what extra documents they could add, and it was even harder to track when they were actually signed or which documents got missed.

The whole process was too hard, too time-consuming and full of limitations. It would take about an hour per client package.



THE FUSEWORKS EFFECT

Before FuseDocs + FuseSign

60 minutes

per collation pack

After FuseDocs + FuseSign

2 minutes

per collation pack

Canny Group

THE SOLUTION

Fast forward, their practice now has adopted both FuseDocs and FuseSign as a combined solution working alongside FYI and XPM.

“It makes me excited because I tend to be very tech-savvy, so anything that can save me 30 seconds that I can implement, I get really excited about because I’m very time-poor. A co-worker who’s been working with me on this project initially wasn’t as excited as me, and he recently wrote to me saying, ‘I’ve been convinced now!’”

THE OUTCOME

Jamie is impressed by how much easier and extremely fast the whole process has been.

“It’s taking me less time actually to send the documents out than it did for me to prepare everything to give to the admin team member to then send out.”

What before used to take an hour now takes Jamie two minutes. What used to be a bit of a disjointed report that took too long to be produced now became an easy, effortless and professionally presented client pack.

“It’s amazing. It’s really fantastic. It produces a beautifully branded PDF for the client to review. We didn’t have the ability to have bookmarks or a page of contents, for example, with the page numbers on it. But now we have it in two seconds.”

With the end-to-end solutions from FuseWorks, Jamie is able to collate and generate the client packs in FuseDocs and send them off to FuseSign to be signed digitally by all parties in a family group.

“It is really streamlined. We’re also sending a few things directly from FYI using FuseSign too, like the engagement letters and BAS. It’s wonderful, even just the

simplicity of it. And the clients find it much simpler as well because it’s a lot easier to enter that code off the phone than it is to remember that password that you only enter twice a year.”

Jamie also raves about the support she has received from the team at FuseWorks. **“They are very responsive! I’ve reached out for help to start integrating the system with BAS and Super Fund, and Paul and the team have been fantastic!”**

The impact seen by Jamie since implementing FuseDocs and FuseSign is remarkable. A previously clunky process, taking an hour per pack, down to two minutes.

The positive impact doesn’t stop internally with their processes and team. The clients find it much easier to log in and navigate the process. **“For example, we had a client, a BAS client who wasn’t tech-savvy and was resistant to use our previous signing platform, but with lockdown this week, we sent out a document to him through FuseSign, and he had no issues.”**

Jamie says she has no hesitancy about recommending both FuseDocs and FuseSign to other firms. **“I actually just recommended it to our financial planning division. They have a little bit of an issue at the moment trying to get documents out the door because they have a lot higher security requirements than what we do as accountants.”**

Jamie is excited about the future and what is next. She’s planning on continuing to find creative ways to add efficiency to the business, saving on time and offering an outstanding client experience along the way. **“Once we get our BASs and Super Funds underway, I’m actually going to keep looking at more and more things and rolling it out across the practice to our team and the other divisions”**