

Streamlining Digital Signing at HB&O

HB&O is an award-winning Accountancy and Business Advisory firm with offices based in Leamington Spa and Coventry. As a team of over 100 dedicated and approachable accounting professionals, they offer services to both individuals and businesses, bringing a broad range of expertise and experience to help support clients through every stage of their personal and professional lives. HB&O is also part of the international association, DFK International, which is made up of more than 200 accountancy firms spread across over 100 countries.

HB&O have had remarkable success in 2023 – they recently won the “Accounting Excellence International Firm of the Year award,” recognising their growing international presence.



BUSINESS SNAPSHOT

Client:

HB&O.

Business:

Located in Leamington Spa and Coventry, UK, HB&O offers the following: audit, compliance services, tax and VAT advice, outsourced solutions to bookkeeping (Virtual Finance Office), corporate finance and payroll.

Business size:

100+ Staff

Document Management System:

FYI

Practice Management System:

Xero Practice Manager

Digital Signing Solution:

FuseSign



FuseSign is an excellent product with great integrations and product support



Mark Ashfield, Managing Director
HB&O



Lisa Saiya, Practice
Manager Assistant



CASE STUDY



HB&O



Mark and Lisa stated they have no hesitation in recommending FuseSign to other DFK firms and said, "FuseSign is an excellent product with great integrations and product support". They strongly recommend FuseSign to firms seeking efficiency, security and seamless integrations in the industry's leading applications.

THE FUSESIGN AND DFK PARTNERSHIP

DFK International fosters connections and collective knowledge-sharing between accountants



to help them develop their Practices and support their clients. FuseSign has several FuseSign DFK ANZ partners with DFK Benjamin King Money, DFK Hirn Newey, DFK Nugents, DFK PA Partners and DFK Gray Perry, to name just a few.

"We have no hesitation in recommending FuseSign to other DFK firms."

Mark Ashfield, Director
HB&O

We look forward to assisting DFK firms in transforming their practice with the FuseSign digital signing solution. If you are planning or ready to change your firm, [book a one-on-one call](#) to explore the FuseSign solution.



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TO START A FREE 14 DAY FUSESIGN TRIAL!

THE CHALLENGE

HB&O sought a more efficient and integrated solution for document management and digital signing. The existing document management system lacked integration and presented challenges in terms of workflows.

THE SOLUTION

HB&O moved to FYI for the firm's document management. As a secondary part of their transformation journey, the decision to adopt FuseSign was easy for HB&O as it has a seamless integration with Xero Practice Manager (XPM) and FYI – an integration essential to maximise efficiency.

FuseSign's secure Two-Factor Authentication process for document signing was a driving factor in the decision, for security and client ease.

The FuseSign, FYI, and XPM integration has resulted in HB&O having a fully integrated approach to communicating with their clients. XPM manages the firm's workflows, FYI automates the creation and storage of all client documents. FuseSign then provides an easy-to-use digital signing solution that is easily accessible directly from the FYI dashboard with firm-wide transparency.