



q4 financial

Smart choices today,
financial freedom tomorrow!



FuseDocs®



FuseSign

q4 financial Case Study

Enhancing Client Experience with Seamless Automation

A modern Brisbane-based business, q4 financial is committed to delivering exceptional service across accounting, financial planning, and business advisory. As part of their cloud transformation journey, the team sought solutions that would elevate client experience without compromising their personal touch.

Their connection with FuseWorks began through Slipstream Group, where they met co-founder Melissa Voss. This alignment of values and vision led q4 financial to implement FuseSign and later FuseDocs, integrating automation into their everyday operations and reshaping the way they service clients.



Why FuseWorks?

- Focus on the Accounting Industry
- Aligned Features and Integrations
- Deliver a Seamless Client Experience
- Strong Support & Collaborative Partnership

Building on this success, the team then implemented FuseDocs. With dedicated onboarding support, the transition was smooth and well-paced. Anne from q4 financial praised the implementation team, sharing:

“Paul & Ciara were exceptional, such quick responses and their attention to detail was a standout.”

The team particularly appreciated how FuseDocs helped maintain business continuity, especially during team changes, allowing them to deliver consistently polished client documents without being impacted by internal staff movements.

THE SOLUTION

FuseDocs enabled the q4 team to generate professional, clickable client packs that reflect their brand beautifully, instantly elevating the client experience. It brought automation to the document collation process, reducing manual effort and the risk of error. Combined with FuseSign, q4 financial achieved:

- A unified, secure signing experience
- Increased confidence handling sensitive information
- Reduced turnaround time for documentation
- A consistent and professional presentation of client deliverables

THE IMPLEMENTATION

The rollout began with FuseSign, a plug-and-play digital signing solution that brought immediate value. It offered a secure, compliant way to deliver documents and was embraced quickly by both the accounting and financial planning teams. FuseSign's team functionality meant that different service lines could manage their workflows independently, ensuring clarity and organisation across the firm.

You couldn't find better customer service anywhere else, everyone goes above and beyond to help



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ANNE MCTAINSH, OFFICE MANAGER | q4 financial

The seamless flow from document preparation to signing, automated filing, and status updates has made day-to-day operations more efficient and scalable.

The integration of FYI with FuseDocs and FuseSign has been such a time saver, having the ecosystem that Fuse offers just makes everything quicker.



FuseDocs



FuseSign



THE OUTCOMES

The measurable results have been impressive:

- Client pack preparation time reduced from 40 minutes to 5–10 minutes
- Improved client satisfaction through a more polished, organised experience
- Faster onboarding of new staff, even those new to the accounting profession
- Enhanced productivity, allowing staff to focus on high-value client engagement

You can trust that everything goes exactly where it needs to with FuseSign. Anne says

I wouldn't recommend anything else other than  FuseSign for Digital Signing

Beyond productivity, the platform has supported training and onboarding by offering visibility into the full client workflow—helping team members understand how each piece contributes to the bigger picture.

SNAPSHOT

BUSINESS:

q4 financial

BUSINESS SIZE

15+ Staff Members

PRACTICE MANAGEMENT

XPM

DOCUMENT MANAGEMENT

FYI

TECHNOLOGY SOLUTION

FuseDocs & FuseSign

IN CONCLUSION

After two years with FuseSign and nearly one year using FuseDocs, q4 financial continues to reap the benefits of their investment in smart automation.

From improved team efficiency to delivering a more secure and professional client experience, FuseWorks' tools have become an integral part of their operations. The firm's proactive approach to tech adoption, backed by supportive vendor relationships, has positioned them for sustainable success.

The biggest win is the client experience—it has made such a difference. And the team loves using FuseDocs & FuseSign.