

## VIDEN ADVISORY

Samara Gilbert, General Manager at Viden Advisory, embarked on a transformative journey to enhance the operational efficiency of their multi-location, multi-service business. Recognizing the need for a comprehensive technology overhaul, Samara aimed to drive consistency, efficiency, and deliver more polished and professional outcomes for both her team and clients.



### BUSINESS SNAPSHOT

**Client**

Samara Gilbert

**Business**

Viden Advisory, South East Queensland locations.

**Business size**

20 + Staff

**Document Management System**

FYI

**Practice Management System**

XPM

**Technology solution**

FuseDocs and FuseSign



**FuseDocs and FuseSign have been a game-changer for our business. The efficiency, streamlined workflows, and improved client experience have elevated our operations to new heights.**

**Samara Gilbert**  
Viden Advisory



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### THE CHALLENGE

The existing systems were outdated and clunky, hindering workflow practices and document management. Samara sought a solution that could align with the brand, simplify document collation, and facilitate seamless end-to-end electronic communications, with a particular focus on elevating the client signing experience.

### THE SOLUTION

Viden Advisory transitioned to an integrated system, embracing FuseDocs and FuseSign alongside XPM and FYI. This strategic move delivered significant value across various dimensions.

### KEY WINS:

#### Efficiency and Streamlined Workflow Practices:

- Integration of FuseDocs and FuseSign streamlined processes, reducing manual efforts and ensuring a more efficient workflow.
- The automated collation and review processes enhanced operational speed and accuracy.

#### Enhanced Client Workflows:

- Clients experienced a notable improvement in the signing experience, leading to higher satisfaction.
- The end-to-end electronic communications aligned seamlessly with the brand and presented a more professional image.

### Security and Visibility

- Viden Advisory gained heightened security and visibility over documents and signing actions.
- The centralized system allowed for better control and monitoring, ensuring compliance and reducing risks.

### Time Savings and Quick Turnaround:

- The implementation of FuseDocs and FuseSign resulted in substantial time savings, allowing the team to focus on more strategic aspects of their roles.
- Quick turnaround times positively impacted client interactions and overall service delivery.

### THE IMPLEMENTATION

The implementation process was seamlessly executed, thanks to the expertise and support provided by Paul Barber from the FuseWorks team. Samara highlighted that the guidance received ensured an efficient and easy transition, minimizing disruptions to daily operations.

### CONCLUSION

The adoption of FuseDocs and FuseSign, alongside complementary tools, has positioned Viden Advisory as a leader in their industry. The comprehensive overhaul not only addressed existing challenges but also future-proofed their operations, ensuring sustained efficiency, security, and a superior client experience. Viden Advisories success story stands as a testament to the transformative power of embracing innovative solutions in the accounting business.