signNow

E-signature in digital accounting: signNow for PennyBooks

Initial pain points before switching to signNow:

Before signNow, PennyBooks was using a single portal-based e-signing solution which was designed specifically for the accountants to share documents with their clients. Despite being a designated accounting-oriented software, this previous solution could not completely fulfill the demands of PennyBooks' digital workflows:

> "We are a fully digital firm and this solution was very clunky for us. It looked like it hadn't been redesigned since the early 2000s," says Dallas.

Thus, PennyBooks started looking for e-signature alternatives while keeping the following four prerequisites in mind:

- Document security and compliance

- Ease of process automation (ideally, a low-code or no-code solution)

- The ability to incorporate a logo and have personalized branding for all documents

- An interface that would be seen as user-friendly by any type of client

Customer profile:

- Brendon Dallas, Founder.

- PennyBooks.io

- London, United Kingdom.

Customer background:

PennyBooks is a digital accounting firm providing services to contractors, lifestyle businesses, and start-ups across the United Kingdom.

In these many months of working from home under lockdown, PennyBooks has been offering a life-saving alternative to old-fashioned paper-based accounting — a completely digital solution that comprehensively covers monthly bookkeeping, self-assessment, tax optimization, and much more.

Along with digital workflows for professional accountants, e-signing is an expected component.

How did signNow meet these requirements?

Security & compliance

This first requirement was easily met by signNow with only four letters — GDPR. GDPR compliance became the starting point to considering a switch to signNow. Since nearly all of their accounting documents contain personal information, GDPR is a must for digital bookkeeping. In addition to that, PennyBooks are also using the option to set a secret password for protecting documents sent out for e-signing.

"We are able to ensure we are always compliant while still keeping the process simple and clean for all our customers," notes Dallas.

Document branding

A company's logo is a seemingly insignificant element of a document workflow. However, when all businesses are now being forced to go 100% digital, the value of brand recognition should not be underestimated. Custom branding in signNow has helped PennyBooks remain noticeable despite all the electronic paperwork a client might be getting in their inbox.

"signNow's custom branding is perfect for us. We have a distinct brand that we've invested into and the ability to seamlessly integrate it with signNow is a marketing opportunity that sets the tone of the relationship from the very beginning of our communication. For a client e-signing their engagement letter with us, this would be one of their first impressions. We have to get off to the right start with them in terms of the look and feel of our brand," explains Dallas.

No-code automation

At the time of switching to signNow, PennyBooks staff were already familiar with Zapier, a no-code solution designed to automate workflows via the integration of various web applications. Using the so-called "zap" (a trigger-action tool in Zapier that connects the apps of your choice), PennyBooks were able to integrate signNow with their in-house accounting solution:

"The ability to connect signNow to our other technology via Zapier was brilliant. Even for accountants like us, with no coding skills, we've been able to automate a lot of our onboarding and accounts finalization processes with the combination of signNow and Zapier," confirms Dallas.

Lightweight interface & intuitive UX

Usability is an integral part of customer experience, satisfaction, and long-term loyalty.
If you are offering a certain software solution to your customer, you will need to keep in mind the many variables on their side: How tech-savvy is your customer? Are they mobile-first or desktop-first? Professional experience, frequency of software use, and even the customer's age are important for usability. Luckily, in the case of signNow, there is only one truly important variable — the availability of an internet connection. The rest of the user journey is very much self-explanatory and intuitive, even for the most inexperienced user.

Compared to where we came from, the look, feel, and usability of signNow is a major step for us. The experience we are offering to customers when it comes to e-signing documents is part of our brand now. We can truly delight our customers with signNow," says Brendon Dallas. "I would highly recommend signNow to any business looking to streamline their document signing process and delight their customers while doing it!"