FuseSign

Maximising your Tech Stack

SMARTER IMPLEMENTATION GUIDE

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Is your accounting tech stack working as hard as it should?

Think about the last piece of software your firm introduced.

What was meant to change? Was the team going to save time, reduce follow-up, create a more consistent workflow or make life easier for clients? And once the software went live, did those improvements actually become part of the way your firm works?

Accounting firms are not short of technology. Practice management, document management, digital signing and specialist workflow tools can all make the firm more efficient. But adding another platform to the stack does not automatically create a better process.

Sometimes the timing is wrong. Sometimes the people who complete the work every day are involved too late. Sometimes everybody is responsible for the rollout, which means nobody really owns it. Training happens, the system goes live and then the firm slowly returns to familiar workarounds.

At FuseSign, we see software implementations at every stage of the technology journey. Sometimes digital signing is one of the first changes a firm makes. Sometimes it is introduced in the middle of a wider transformation, and sometimes it is the final piece connecting practice management, document management and client workflows.

That gives us a front-row seat to what helps a project build momentum and what causes a promising implementation to stall. Across those experiences, three habits make the biggest difference.

The smarter approach

1. **Start with the problem**
2. **Give the project a genuine owner**
3. **Keep improving after go-live**

Start with the problem, not the software

There is always a temptation to jump straight to the solution.

A manual process is frustrating, a new platform looks promising and the team wants the problem fixed. But before you compare features or set a go-live date, take a step back. What is actually getting in the way?

<u>Look at the work your team is doing today:</u>

- Which repetitive or mundane tasks are taking time away from higher-value work?
- Where are you seeing inconsistent outcomes across people or teams?
- Where does work slow down, wait for a hand-off or require unnecessary follow-up?
- Is the real issue staffing, process, software, or a combination of all three?

That last question is important. New software cannot repair a process nobody understands or a responsibility nobody owns. It can support a better way of working, but the firm needs to define that better way first.

Follow the workflow start to finish

You do not need a complicated process map. Start with one real piece of work and follow it through the firm. Note who touches it, which systems are used, where information is re-entered and where somebody needs to chase the next action.

For a client document workflow, that could mean tracing where the document is created and approved, how it is sent, how signing and reminders are handled, where the completed file is stored and how the team knows the job is finished.

Once the friction is visible, it becomes much easier to decide what the new software needs to do and how it should connect with the systems you already use.

Pick a time your firm can support

A new financial year or calendar year can feel like the obvious time for change, but a neat date is not always a good implementation window. Look across the whole operating calendar. Consider lodgement deadlines, busy periods, annual leave, staffing changes, client commitments and other projects competing for attention.

Ask how much change the firm can genuinely absorb. A slightly later rollout with the right people available will usually create more value than an ambitious date that leaves the project fighting for attention.

Bring the team in before final decisions

The people completing the work every day will see issues and exceptions that are easy to miss from a leadership or project perspective. Involve them while the workflow can still change, not for the first time in a training session at the end.

You do not need every person in every meeting. You do need the right voices in the room early enough to improve the plan and understand why the change is being made.

Put it into practice: action plan

□ The problem we are trying to solve is clear and specific.

□ We have followed the current workflow and identified the friction.

□ We know what the software and the new process need to achieve.

□ The people who use the workflow have contributed to the plan.

□ The timing accounts for deadlines, annual leave and competing projects.

□ The provider has helped us pressure-test the workload and timeframe.

Give someone the job of making it work

If everyone owns the project, often no one truly owns it.

One of the strongest patterns we see in successful implementations is a dedicated project champion. This person keeps the work moving, connects the provider with the firm and helps the wider team turn the new platform into a consistent way of working.

Without that ownership decisions drift, questions sit unanswered and different teams begin using different processes. The software may stay in the stack, but adoption and confidence begin to fall away.

What does a project champion actually do?

<u>During the rollout, the project champion:</u>

- acts as the main point of contact for the software provider
- coordinates decisions, testing, training and team communication
- keeps the implementation moving and raises blockers early
- makes sure the agreed workflow reflects how the work is really done

<u>The role does not finish at go-live. Over time, the champion:</u>

- supports new team members and reinforces the standard process
- stays across relevant product updates, training and webinars
- looks for capability the firm may not be using
- brings practical improvement opportunities back to the team

Choose the right person, not the most senior

The best champion might be a partner or practice manager, but it could just as easily be someone closer to the day-to-day workflow. Look for a person who enjoys improving systems, communicates well and is genuinely interested in getting more value from technology.

Leadership still matters. The champion needs a sponsor who can make timely decisions, support the change and give the role enough authority across the firm.

Give them room to do the job

Do not place the champion role on top of a completely full workload and hope enthusiasm will carry it. Testing workflows, answering questions, attending training and reviewing adoption all take time. Some responsibilities may need to be delayed, shared or removed.

Protected capacity is not an extra cost around the project. It is part of what gives the technology a fair chance to deliver the efficiencies the firm expected.

Your project champion check

☐ One person has clear day-to-day ownership of the implementation.

☐ They understand the workflow and have the team's trust.

☐ A leadership sponsor can make decisions and remove blockers.

☐ The champion has protected time for testing, training and support.

☐ Their responsibilities continue after the initial rollout.

Going live is only the beginning

The system is configured. The team has been trained. The first live workflow is ready.

That is an important milestone, but it is not the finish line.

The firms that gain the most long-term value from software keep testing, learning and improving after launch. They treat the first version of the workflow as a strong starting point, not something that can never change.

Test with the people doing the work

Before launch, run the intended workflow from beginning to end. Include the people who will use it every day. They are often the first to spot an unclear hand-off, an unnecessary step or a client-facing detail that the project team has missed.

<u>A useful test should confirm that:</u>

- the workflow solves the original problem
- each person understands their part of the process
- the hand-offs between people and systems are clear
- the client experience is straightforward
- the team knows what to do when a common exception occurs

Train for real work, not only for launch

Initial training gives the team a foundation, but many questions only appear once people are completing real work. Follow up after launch, when the team has practical examples and can connect the guidance to the task in front of them.

Give new starters the same agreed process. Share relevant product updates with the people affected. Use provider webinars and training to keep the champion current. If old workarounds begin to return, use targeted training to restore consistency.

Keep looking for the better way

Software changes. The firm changes. Client expectations change. A process that was right at launch may need to be adjusted, and new functionality may make a manual step unnecessary.

Return to the original problem and ask what has improved, where work is still slowing down and what the team has learned. The goal is not constant change. It is to make sure the firm keeps receiving value from the tools it is already paying for.

A simple review rhythm

- **Before launch** - Test the complete workflow and resolve any issue that would stop the team or client completing it.
- **In the first few weeks** - Capture questions, friction and inconsistent use while the experience is fresh.
- **Once the workflow has settled** - Review the original objective, reinforce training and choose one or two worthwhile improvements.
- **Ongoing** - Build product updates, new-starter training and workflow reviews into the champion’s role.

Your smarter implementation checklist

Before you commit

☐ Can we explain the problem without naming a product?

☐ Have we followed the current workflow and found the real bottlenecks?

☐ Do we know what better will look like for the team and clients?

☐ Have daily users had a chance to shape the plan?

Before you implement

☐ Does the project have one champion and one leadership sponsor?

☐ Does the champion have enough time and authority to do the job?

☐ Does the timing account for busy periods, leave and other projects?

☐ Has the provider helped us understand the workload and rollout?

Before you go live

☐ Have daily users tested the complete workflow?

☐ Does everyone know the standard process and where to get help?

☐ Do known issues have an owner and a next action?

After you go live

☐ Are we capturing and resolving questions from real work?

☐ Are new starters being trained in the same process?

☐ Are relevant product updates reaching the right people?

☐ Are we reviewing the workflow and continuing to improve it?

Better software, habits, and results

Maximising your tech stack is not about collecting more tools. It is about making each tool support a clear, consistent way of working.

Start with the problem and plan the change around the reality of your firm. Give one person the responsibility and capacity to make the implementation work. Then keep testing, training and improving after launch.

Those habits help protect team capacity, create more consistent workflows and deliver a smoother experience for clients. They also give every technology investment a better chance of producing the value the firm expected when it chose the platform.

Want more out of your tech stack?

Your technology delivers more value when every tool solves a clear problem and works well with the systems around it. FuseSign helps accounting and bookkeeping firms simplify document signing, reduce workflow friction and create a smoother experience for teams and clients.

See how an accounting-focused signing solution could fit into your firm's technology stack.

About FuseSign

FuseSign is powered by FuseWorks, a business founded by accountants who experienced the challenges of client document signing firsthand.

It supports flexible signing workflows for tax documents, engagement letters, compliance forms, financial statements and other client-facing documents.

FuseSign

Digital signing, done simply

Trusted by 2,500+ firms globally

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