



## DELOITTE PRIVATE

Deloitte Private helps Australia's largest private businesses and their owners with their most complex problems, delivering a broad range of services including complex advisory, core compliance and finance function support. Through its Private Connect platform, clients can work with their accountant in real-time. This enables business owners to focus on running their business and spend less time on administration.

### CHALLENGE

Michael Clarke, Chief Strategy Officer for Deloitte Private said, "The original intent behind the Private Connect platform was to disrupt our own business model with an integrated cloud accounting platform to streamline and enhance the way we deliver our accounting services to our clients. With the continued pace of change arising from disruptive technologies, we knew the professional services industry was ripe for change. Looking for ways to streamline our back-office processes by removing friction for clients and practitioners became a priority."

The Private Connect platform has evolved into a fully integrated ecosystem, enabling practitioners to service clients faster and more effectively with all the right tools at their fingertips. Until recently, however, one significant issue remained: client engagement letters were still handled manually, printed in multiple copies, and required physical signatures by multiple people.

This process was costly, inefficient and a cumbersome experience for both clients and staff. Additionally, the average turnaround time on letters was seven and a half days.

## Deloitte. Private

### RESULTS

**\$1M**

savings resulting from more efficient signing process



**40%**

of engagement letters turned around within one hour



## SOLUTION

DocuSign was integrated into the Private Connect platform in July 2017 and implementation of the new process took just three months. Engagement letters are now sent and signed using DocuSign. Information flows seamlessly from Salesforce to DocuSign, making document creation easier and more accurate.

This new process has instantly improved the ease and convenience of clients engaging with Deloitte. It's also improved document security, which was a key objective in partnering with DocuSign.

"I had a lot of trust and confidence in DocuSign, and from a security and risk standpoint, it met all of our requirements," said Clarke. "We were also very interested in DocuSign's innovation in the payments space. Our billing and cost model is disruptive in the industry and we could see the potential to take that further."

## RESULTS

The adoption of DocuSign was rapid as the technology was easy to use and the benefits immediately visible. Once client contacts and emails are updated inside the Private Connect Platform practitioners can quickly create and send engagement letters. They can set automated reminders instead of chasing signatures. There's also greater security and traceability of engagement letters which, once executed, are stored centrally within the Private Connect Platform.

From a service perspective, the new streamlined process is more in tune with clients' needs. They no longer need to find time to print or scan. They can sign and execute engagement letters from anywhere. As a result, 40% of engagement letters are now turned around within one hour.

"The success we've had with DocuSign has helped foster a culture of continuous improvement, which not only drives innovation amongst teams but delivers a better customer experience. We have more time to be proactive with our clients, which opens up opportunities to structure our workforce around automated processes like eSignatures."

The business has set the bar high for the rest of Deloitte Australia, which now plans to streamline the hundreds of engagement letters it uses today. It's also in a more enviable position than ever as it seeks to lead the market for high net worth clients with its cloud accounting model.



"This technology solution, together with process re-design and training, has led to substantial efficiencies and cost savings in excess of \$1 million."

---

**MICHAEL CLARKE**

CHIEF STRATEGY OFFICER,  
DELOITTE PRIVATE

---

## ABOUT DOCUSIGN

DocuSign is changing how business gets done by empowering anyone to transact anytime, anywhere, on any device with trust and confidence. DocuSign keeps life moving forward.

## CONTACT

**APAC** +1 800 255 982 | [docusign.com.au](http://docusign.com.au)

**U.S.** 866.219.4318 | [docusign.com](http://docusign.com)

**EMEA** +44 203 714 4800 | [docusign.co.uk](http://docusign.co.uk)