

# Hedgehog Investments Makes Productivity Gains Using Docubee

Hedgehog Investments switched to Docubee from Adobe Sign to save time spent preparing documents and boost ease of use for clients.

## Overview

Hedgehog Investments was founded five years ago to make alternative investments more accessible to a broader range of people. Specifically, Hedgehog assists businesses through a set of services provided by their servicing partner, helping them position themselves to qualify for a loan.

Hedgehog Investments services all industries, with a focus on small and medium-sized businesses. Their firm experienced accelerated growth due to high demand, necessitating a more efficient method for handling paperwork. That's when they found Docubee.



## Challenges

When Hedgehog Investments first launched, they chose Adobe Sign to handle the 10-20 documents they sent each month. The process involved using a set of templates they had created in Google Docs, making copies of each template, adding specific information for each new client, and exporting the documents as PDFs before finally uploading them into Adobe Sign. From there, they would configure fields and prepare the PDF before sending for signatures and finalization.

The process worked well for them at first, but as business picked up, it was time to seek a better solution.

**"We grew a lot faster than we had expected, and so that 10 or 20 documents a month started turning into 50, 60, 100, 200 documents a month, and then it became extremely cumbersome,"** shared Matthew Bates, Founder and CEO.

Bates noted that each new investor being onboarded requires several documents to be sent out. Additionally, his team was responsible for managing all existing extensions, renewals, and other internal day-to-day documents that needed signatures. "It was taking an unbelievable amount of time and introducing a lot of stress because we weren't going to hire someone just to send out documents," shared Bates. While they were using templated documents, changing out the individual information for each client started to add up.

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Having a background in software engineering, Bates had a clear vision in mind for what his ideal contract management tool would include for the Hedgehog Investments team. Previously, he had written specs for a contract management and a signature tool, but found it would have been too costly and time-consuming to create.

## The Woes of Docusign

Bates investigated Docusign first, with hopes of leveraging their document templates. He noted that Docusign was his first choice because it is the most well-known in the document signing space. However, after signing up, Bates was frustrated by their confusing pricing structure. Bates shared, "You purchase something, and then you find out it has a whole bunch of limitations." This experience prompted him to cancel and seek a new solution immediately. That's when he stumbled across Docubee.

**"I haven't found anything yet that is as far along that road as Docubee. What I was looking for was a tool that treated a document like a living thing with a lifecycle. When you start a document, it's no longer static. There needs to be collaboration."**

- **Matthew Bates**, Founder & CEO, Hedgehog Investments

## Results

Since implementing Docubee to handle documents, Hedgehog Investments has seen gains across the board.




### Hours Saved for Key Team Members

With 3 key team members utilizing Docubee at Hedgehog Investments, the time savings have been immense. Bates shared, **"Docubee was a breath of fresh air. It has cut hours out of our CFO and Director of Client Relations' weeks."**

Hedgehog has set up a number of reusable workflow templates that utilize document generation, conditional logic, and required fields, allowing their documents to easily flow through the necessary steps before signing.

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One example is Hedgehog Investment's internal contract extension workflow. The team needed to send out a batch of 215 of these contracts, and each one would have taken between 3 and 5 minutes to prepare and send using their old method. With Docubee, they were able to upload a CSV file and send everything out immediately. "It took us 10 minutes to set up and figure out the file because it was the first time we'd used it, run a quick little test just to make sure we were doing it right, and then send out the entire thing. That one instance saved us about 10 hours of work. That one example saved us enough money to pay for half of the subscription cost of Docubee. And that's huge," Bates shared. "Our CFO almost cried because he was so happy."

"There are many documents sent out every single day, and Docubee has just saved hours and hours of time."

- **Matthew Bates**, Founder & CEO, Hedgehog Investments



## Easier Compliance

Occupying the financial sector requires completing necessary compliance paperwork, and Hedgehog Investments trusts Docubee to deliver the security they need when handling these documents.

Bates noted, "It's helped us achieve the same level of compliance much easier and much quicker because the whole process has been simplified using Docubee. It also enables us to keep the right people up-to-speed."



## End User Simplicity

Hedgehog Investments aims to make the world of finance more accessible to everyday people, and they utilize Docubee to simplify the paperwork involved for their clients. Bates noted that Docubee is simpler for clients to use and that they have received good feedback. He shared, "I don't know why more platforms don't do this, but having the panel on the right side of the screen showing all of the fields that require attention in the document is so helpful."

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Each document in Docubee shows required fields that must be completed before the document can be completed. Bates further shared, "Clicking on those navigates you to those fields. You'd be surprised by how many people struggle with different platforms we've used to figure out where they need to do what."

**"Docubee makes it so simple, and that's what the end user needs. Our documents are complex enough. We don't need to have them hunting for what they even need to do."**

- **Matthew Bates**, Founder & CEO, Hedgehog Investments



## Well-Branded Documents

With Docubee, the Hedgehog Investments team can send out well-branded, uniform documents that uphold their professional appearance.

Bates told us about his experience with other tools, and shared, "There are some other platforms out there that let you use an API to inject things into the different fields, but I wanted to do that to the document before it was made static, because well-branded documents are important to me and my business. I don't like documents going out that just have these boxes on them that look like they were added afterwards."

Thanks to Docubee, Hedgehog Investments has the tools it needs to support its continued growth.



## Hedgehog Investments Cuts Hours Out of Their Paperwork Processes with Docubee.





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## About Hedgehog Investments

Founded in Utah, Hedgehog Investments was established to provide easier access to investment returns for others. With over 30 combined years of investing experience, Hedgehog believes that excellent returns on investment shouldn't be hard to come by and that financial partnerships should be about building strong relationships and real trust. To learn more about Hedgehog Investments, visit [hedgehoginvestments.com](https://hedgehoginvestments.com)

## About Docubee

Docubee, an Accusoft brand, is a simple contract automation platform that lets businesses create, manage, sign, and track digital contracts in one secure platform. Docubee powers contracts by enabling users to gather vital customer data, create contracts using tools like generative AI or pre-built templates, and connect pieces of the process with dynamic workflows. Users can integrate Docubee with their existing site or platform via the API or connect to thousands of apps and CRMs using native and webhook-powered integrations. For more information, visit [docubee.com](https://docubee.com)

