



# Atlantic Payroll Partners Automates Onboarding & Sales with Docubee



Atlantic Payroll Partners is a professional employer organization (PEO) based in Fort Pierce, Florida that provides businesses from small to large with a variety of human resources and payroll services. Rather than hiring a dedicated internal team to manage administrative tasks like workers' compensation, health insurance policies, and 401k contributions, organizations can turn them over to the specialists at Atlantic Payroll Partners and get back to focusing on their core business.

## Overview

As a PEO who manages a variety of HR tasks for their clients, Atlantic Payroll Partners spends a lot of time onboarding employees for clients so that their payments, insurance, and other benefits can be set up properly. Traditionally, this process involved a lot of manual paperwork for Atlantic Payroll Partners, with the team emailing packets of documents to be printed, filled out by hand, and then scanned back into digital form so they can be emailed back for processing. The old way of collecting and keeping track of these documents proved to be time-consuming and prone to error, not to mention difficult to track.

The same dependence on physical paperwork was also creating challenges for the company's sales team. Minor errors and missing information delayed the client onboarding process, making it hard to get new customers up and running quickly.



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“It was slowing down the rest of the onboarding team,” recalls Roché Johnson, Marketing Coordinator for Atlantic Payroll Partners. “Forms were being half-filled out or filled out based on our assumptions instead of being given to the incoming client. We wanted to get rid of that.”

## Challenges

Although Atlantic Payroll Partners had access to client onboarding resources through one of the tools they used, the system was expensive and lacked the flexibility needed to assist the sales team with document collection, and eventually expand automation into other processes. Johnson knew they needed a solution to expedite employee onboarding for the clients they serve that offered the right combination of pricing and flexibility.

“We looked at DocuSign, but it was outrageously priced,” explained Johnson. “Some of the other companies thought they could do what we needed, but they weren’t sure.”

After discovering Docubee, Johnson signed up for a free trial and was immediately impressed by the customization options that were offered. “I could see right away how we would utilize Docubee. Other demos weren’t as strong and spent too much time saying, ‘Oh, we can do that later,’ which you know is not going to happen.”

The next step was building an initial workflow to handle employee onboarding for the clients that Atlantic Payroll Solutions serves. Johnson worked with the Docubee team to implement key features like documents, forms, and eSignature support to digitize the entire process. This enabled them to send out entire onboarding packets to new employees to fill out online and submit with legally binding signatures.

After rolling out automated onboarding workflows, Johnson set about creating a new set of workflows for their internal sales department to utilize including client intake documents and sales agreements. The Docubee support team was there for assistance during this phase of the implementation as well. Whenever Johnson had questions while building out her sales workflows, the Docubee team was able to identify the issue and ensure the new templates were rolled out right away.

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## Results

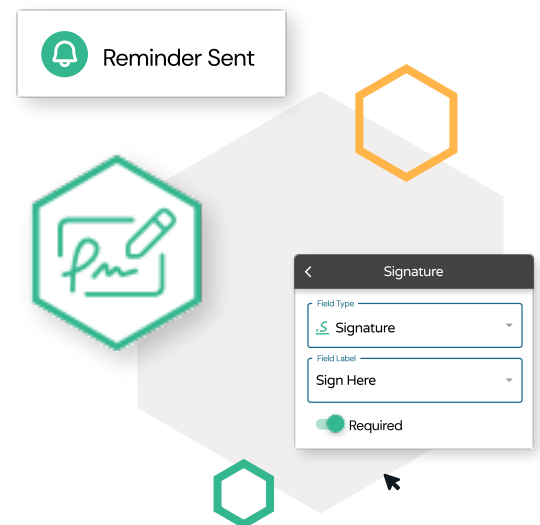
Implementing onboarding services and sales contract automation with Docubee has helped Atlantic Payroll Partners improve efficiency and accuracy across their PEO services. Where physical paperwork used to get lost in the shuffle, digital forms and eSignatures have ensured that complete and accurate information is collected and every case can be tracked quickly and easily.

“From a sales and employer point of view, automation is the best feature,” Johnson says. “You put their email in, you send it off, and they get started. You don’t have to babysit it.”

Even better, automating key portions of the sales process has enabled the team to cross-sell services to incoming clients. By including form fields asking new customers if they’d be interested in other payroll or HR solutions, sales reps are identifying needs faster to expand relationships. “Getting the sales reps to buy into it went well and it’s helped out in more ways than we originally thought it would,” Johnson points out.

With key onboarding and sales tasks running smoother than ever, Atlantic Payroll Partners is exploring workflow automation opportunities in other business areas too. “Pretty much any form we have that’s on paper will become digital,” Johnson says. “We handle lots of workers’ compensation claims right now and that’s a lot of paperwork. If we can automate that process, we’ll be able to get documents sent faster when someone gets hurt.”

Thanks to Docubee’s intuitive workflow tools and flexible automation capabilities, Atlantic Payroll Partners has the right partner in place to help them meet future challenges for their clients.



I’ve been extremely happy with Docubee. It’s helping us unlock new revenue streams a lot sooner than we would have in the past.

— ROCHÉ JOHNSON,  
MARKETING COORDINATOR,  
ATLANTIC PAYROLL PARTNERS

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## About Atlantic Payroll Partners

Atlantic Payroll Partners, a leading professional employer organization (PEO), specializes in offering tailored payroll, HR consulting, premium benefits, accounting, and workers' compensation solutions to help businesses grow, save time, and reduce costs. By partnering with new and small businesses, Atlantic Payroll Partners provides essential administrative services, enabling employers to focus on their passion, maintain balance, and achieve their full growth potential with customized solutions that fit their unique needs. With over 100 years of combined team experience and certifications in payroll and HR, the company's expertise and commitment to excellence set it apart in the industry. For more information, visit <https://atlanticpayroll.us>.

## About Docubee

Docubee, an Accusoft brand, is an intelligent 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).

