



Contact Hamilton Finds Their All-in-One Solution with Docubee



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Overview

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Challenges

From its inception, Contact Hamilton has managed all of its processes using paper, which worked great when employees physically worked in the office. However, when the COVID-19 pandemic struck and staff were sent to work remotely, the business' original system for handling paperwork became a challenge. As a social service agency, Contact Hamilton's team handles a variety of different documents and forms related to health and safety, compliance, and more. While navigating the change to working remotely, employees tried to rely on emails and scanning documents, but it didn't feel professional or efficient enough. "Even within our organization, it felt clunky," recalls Dayna Setzkorn, Operations Manager at Contact Hamilton. "It just felt like there had to be better ways."

Documents that had multiple stages of reviews also caused issues for the team when work went remote. One person would kick off filling it out, and then it would be sent down the line from person to person, often with multiple reviewers involved for a single document process. "Doing that by email became more challenging, and so did tracking changes," stated Setzkorn. "Documents were getting edited where they shouldn't be edited so it was very messy." In addition to messy document editing, finding the most current versions of the documents and forms that employees relied on was also a challenge.

First and foremost, the Contact Hamilton team's main priority was to create a digital process for existing forms related to health and safety, and any commonly used policy documents. They also wanted a way to track employee's returns to the office, and the associated paperwork that came along with it.

About a year into the pandemic, Setzkorn decided to start looking into products to make these processes easier for the various teams at Contact Hamilton. First, the business signed up for Adobe Sign, which allowed them to work more efficiently on some pieces of their processes. As Setzkorn recalls, "It made us think, 'Wouldn't it be nice to do more?'" That's when the search for a solution to handle forms and workflows led Contact Hamilton to Docubee.



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Results

Before landing on Docubee, Setzkorn vetted a number of different solutions and used free trials to see what would work best for her organization. “[Docubee] was very user-friendly. Nothing seemed intimidating about it,” Setzkorn shared about her free trial. Support was a big must-have to ensure a smooth roll-out. “One of the other tools that I tried, I really liked and seemed really easy, however, they didn’t offer the same sort of form of support,” shared Setzkorn. It came down to Docubee and one other platform, but ultimately, the responsiveness and readiness to answer questions from the Docubee support team helped Setzkorn feel confident in her choice.

Since making the decision, the team at Contact Hamilton quickly implemented Docubee and is rolling it out to all of the departments within the organization. With a focus on automating health and safety forms, Setzkorn worked closely with Docubee’s customer support team to get processes stood up and answer any questions that she had along the way. Company policy documents and return-to-office forms were also created in Docubee to help the Contact Hamilton team stay ahead of the curve.

Finding a tool that would allow staff to sign off on the various pieces of the review process while keeping an audit trail was crucial. “Being able to track documents is particularly important because often I send stuff out to 60 employees,” stated Setzkorn. “I had a manual process of ticking checkboxes or scribbling memos from my desk, and that was how we’d make sure everybody responds.” Now, Setzkorn can log into her dashboard to see all in-progress workflows, and access completed documents from employees.



reviewing, editing, and approving documents using a combination of emails and document scans. Not to mention the challenges of finding the right documents to kick off the process. With Docubee, staff are able to go to one central link to access the right version of the documents they need. “So far, everyone has been able to use the forms and fill them out completely,” shared Setzkorn. “Before, we might get a problem with something that was created in Adobe like a field not working or permission issues.”

The response from employees sending and receiving forms via Docubee has also been exceptional. “I’ve had great feedback from the people that send the forms, as well as great feedback from the administrative people who receive the forms,” explained Setzkorn. “They love that it comes through and can open it up and easily see it, and it’s always in the same format”. Employees have been able to jump in quickly and use the platform without any issues.

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Throughout implementation, one of the things that stood out most to Setzkorn was the openness to feedback among the Docubee team. Working with the customer support team, she has been able to submit product requests and see their impact. “Even with the update from the old UI to the new UI, I have already noticed some improvements being made. It excites me that it seems to be an ongoing quest to keep the discussion open and make improvements,” said Setzkorn.

As the rollout continues, Setzkorn is working with Contact Hamilton’s HR manager to start automating HR processes. She also plans to automate even more of the forms and documents that her organization relies on each day. During the process, Setzkorn knows she’ll have the support she needs to make it a success with Docubee.



My experience so far has been good in terms of getting support. I love being able to provide feedback and have it heard, that’s a big deal to me.

— DAYNA SETZKORN,
OPERATIONS MANAGER
AT CONTACT HAMILTON



About Contact Hamilton

Contact Hamilton is a social service agency located in Ontario, Canada providing resources and support to children living with developmental, behavioral, and emotional challenges, and adults with developmental disabilities. They work closely with clients to connect them to the services and support needed to live a happy and meaningful life. For more information, visit <https://contacthamilton.ca>.

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.