# HubSync Engagement Letter Wizard

**Send 1,000s of configurable Engagement Letter with ease.**

HubSync's Engagement Letter Wizard module, allows firms to quickly create engagement letters with standardized firm templates and deliver to prospects and clients for electronic signature.

HubSync integrates with the firm's sources of truth to collect CRM, Time & Billing, and compliance software information to incorporate directly into client letters, saving the firm significant time and money.

Build and house standardized templates

- Create "Building Blocks" of language to exist across multiple templates. Update the block once and all templates update automatically.
- Insert conditional logic to apply standardized language based on the client and services to be performed
- Create a wizard experience for users to quick create letters
- Risk-management controls to ensure the latest approved templates and language is used every-time
- Provide help text and tooltips for users along the way
- Route documents to appropriate levels of review and approval
- Red-lining capability to reject/approve proposed changes
- Easily and quickly track the status of all engagement letters
- Signed engagement letters stored in HubSync with the ability to route to the firm's Document Management System or the client's workspace in HubSync

**By formalizing your engagement letters and strategy, you will see:**

- Quicker turnaround times
- A modern client experience
- Significant cost and time savings
- A reduction in risk due to the controlled customized content

**As a firm professional, quickly select hundreds or thousands of clients to receive an engagement letter for signature.**
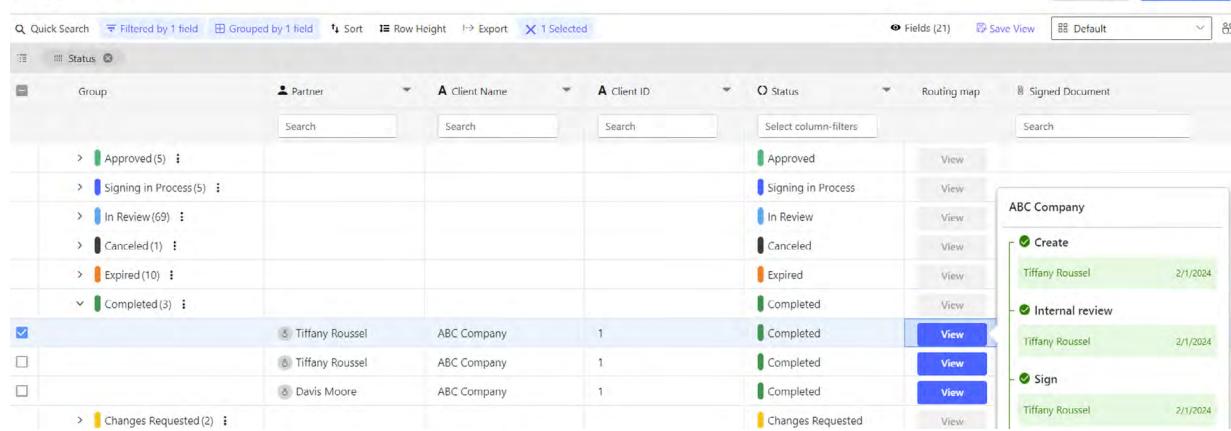
This process will:

- Remove the angst of searching for the latest approved templates
- Allow for data from CRM, Time & Billing, and compliance softwares to automatically flow into the engagement letter
- Eliminate the concern that data (client information, contacts, projects, etc.) is out of date
- Provide for a stream-lined review and approval process
- Track the status of all engagement letters in one place

**Address** 407 C Main St Suite 202
Franklin, TN, 37064 **Follow Us** www.hubsync.com
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## Comprehensive Real-Time Tracking

### For every step in the process



Configurable templates to create building blocks, steps, and conditions to ensuring approved language is used with every delivery.
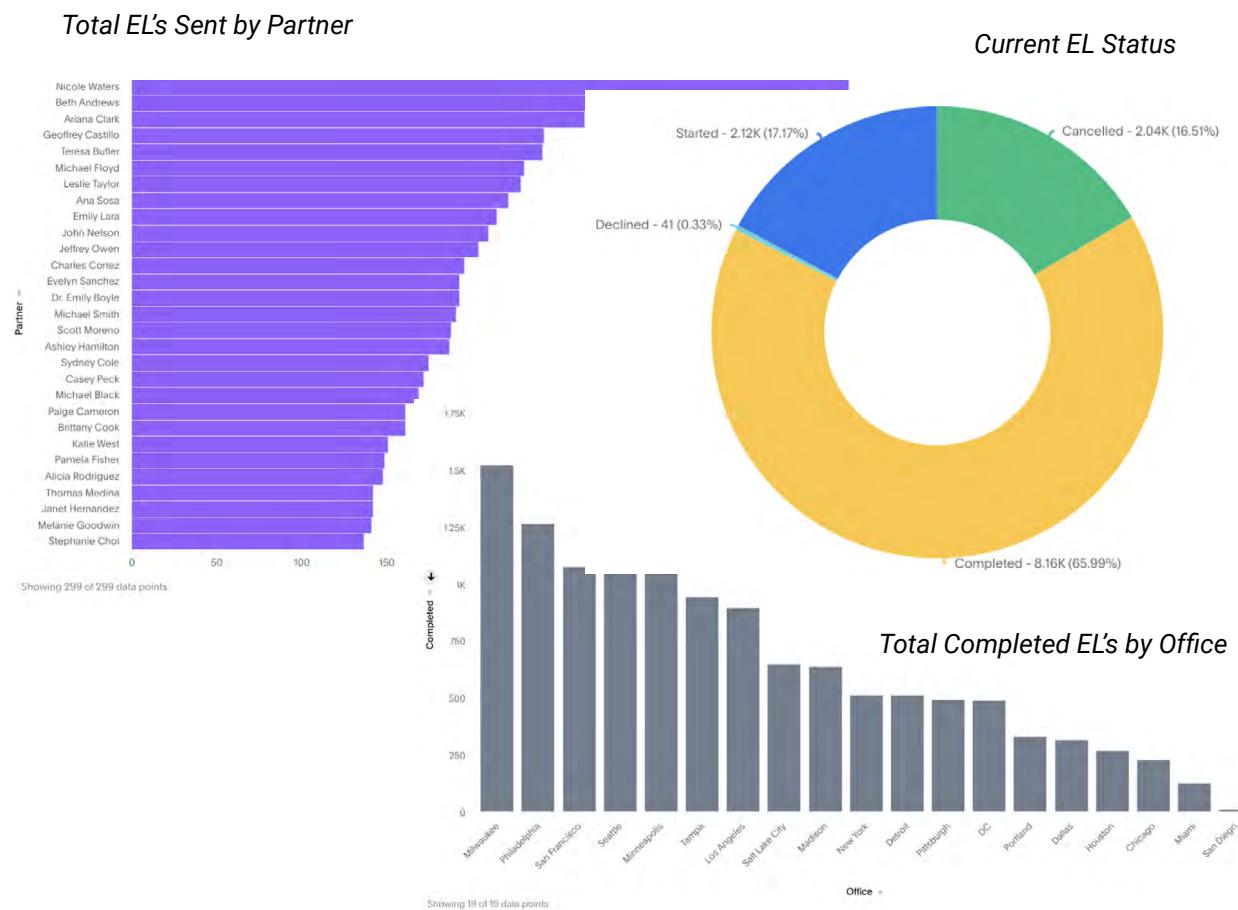


Walk your users through a wizard to ensure the correct language is added at every step. The steps of the wizard are fully configurable by template.

Provides a modern review process to ensure proposed changes are approved by the correct parties.
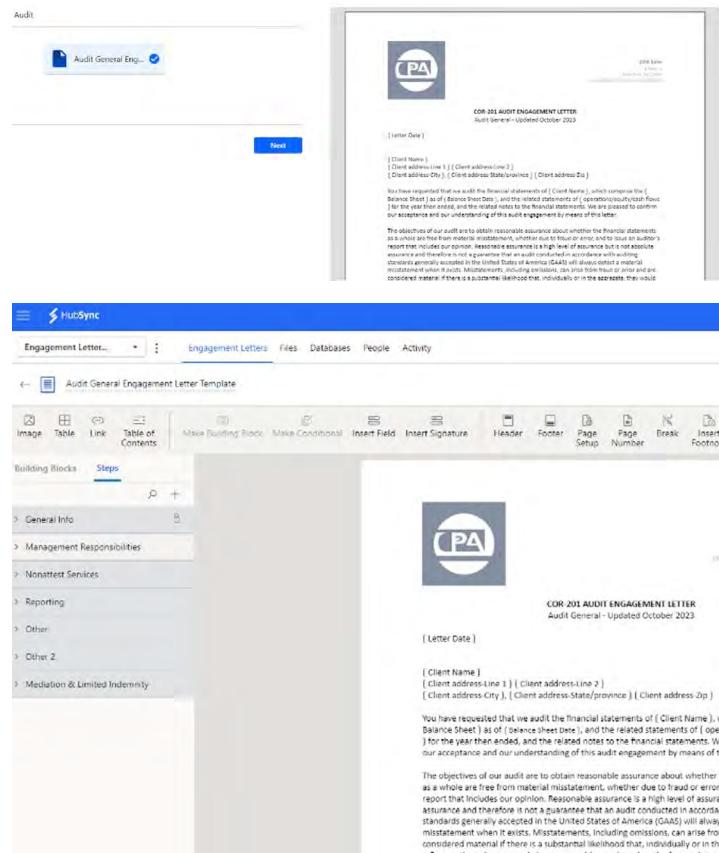
# Real-time dashboard provides KPIs for all engagement letters.

*Total EL's Sent by Partner*

*Current EL Status*

Started - 2.12K (17.17%)

Cancelled - 2.04K (16.51%)

Declined - 41 (0.33%)

Completed - 8.16K (65.99%)

Showing 299 of 299 data points

*Total Completed EL's by Office*

Showing 19 of 19 data points

**HubSync leverages e-sign functionality to deliver the documents for electronic signature.**

A client will:
- ⚡ Receive a secure link in a firm branded customized email
- ⚡ Review the document
- ⚡ Sign

It's that easy!

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