SENDSAFELY

FreshBooks, a leading accounting software provider, serves small businesses with a mission to provide extraordinary experiences that help business owners grow. Tony Ho, Director of Support Operations and Technology, oversees the support technology stack, ensuring compliance, security, and seamless integration with other business systems. Tony, along with the Security and Compliance team, implemented SendSafely to secure FreshBook's support operations.

The Challenge

FreshBooks needed a seamless way to secure sensitive customer data submitted to Zendesk, particularly for its Payroll, Bank Import, and Fraud/Risk teams. The FreshBooks Security and Compliance team mandated that sensitive files could not reside in Zendesk, where they would be exposed to all Zendesk Agents. An additional layer of security and separation was required to protect the customer data and limit access to the minimum number of support agents necessary. Additionally, the security solution needed to be as easy to use as possible for both the support agent and the customer.

Payroll - FreshBooks needed to secure the collection and storage of the sensitive payroll data gathered as part of the initial setup and onboarding of new payroll customers.

Risk/Fraud - When FreshBooks' automated Know Your Customer (KYC) processes flag potential fraud risks, a support agent has to step in and manually collect identity documentation to verify the business. The Risk and Fraud team needed to secure this fallback process.

Bank Import - Customer's banking details, required for bank imports, needed the same protection in Zendesk as payroll and identity documentation.

Key challenges:

- Preventing sensitive data from being accessible to all Zendesk agents.
- Ensuring an easy and frictionless file submission process for customers, especially less tech-savvy users.
- Providing seamless agent access to submitted files while maintaining security and compliance.
- Keeping operations cost-efficient and within budget.

"Having documents available to everyone on my team makes it much easier to collaborate on complex cases and assist colleagues who are out of the office."

- Carl Lippert (Program Lead, Payroll Support)

The Solution

After evaluating various options, FreshBooks selected SendSafely's Hosted Dropzone due to its seamless Zendesk integration and ease of use for both agents and customers. The Dropzone provided a secure mechanism for exchanging sensitive files while maintaining compliance and operational efficiency. Key features and benefits included:

- **Seamless Zendesk Integration:** The Dropzone allowed agents to securely collect and access customer files directly within Zendesk without exposing sensitive data.
- **User-Friendly Experience:** Customers could easily submit required documents without navigating complex workflows, reducing friction in the support process.
- **Enhanced Security & Compliance:** The solution ensured sensitive data remained outside Zendesk's ticketing system, aligning with FreshBooks' security policies.
- **Operational Flexibility**: The shared access feature allowed different agents to collaborate on cases while maintaining security.
- **Cost-Effectiveness:** The solution met FreshBooks' budgetary constraints while delivering the required functionality. *"We had a very specific budget to get this out ASAP. And SendSafely was able to meet that need." - Tony Ho (Director of Support Operations and Technology)*

The implementation process was straightforward, with SendSafely's comprehensive documentation and responsive support team assisting in quick deployment. Notable outcomes include:

- **Improved agent workflow efficiency:** FreshBooks agents praised the simplicity and efficiency of SendSafely's integration. One agent shared that using SendSafely's customer download notifications "feels like a cheat code" in providing fast, secure responses.
- **Positive user experience:** The solution provides minimal friction for customers when submitting sensitive documents. "It's definitely helping us build that client and partner trust via the secure and easy-to-use workflow."
- **Stronger compliance and security posture:** SendSafely helps Freshbooks meet its regulatory requirements for handling financial data.

SendSafely's Hosted Dropzone has enhanced FreshBooks' approach to handling sensitive customer data. By offering a secure, user-friendly, and cost-effective solution integrated with Zendesk, FreshBooks has strengthened its compliance posture, improved agent productivity, and enhanced customer trust. This partnership ensures FreshBooks can continue delivering seamless and secure support experiences while maintaining operational efficiency.

"Because SendSafely is so easy to use, I do not have to spend time deciding if a document attachment warrants secure document handling procedures. If a document contains any business-specific information, I send it with SendSafely by default. With the Zendesk integration, it is just as easy as regular attachments."

- Carl Lippert (Program Lead, Payroll Support)