

## Flexential automates their quote and contract processes with the DocuSign Agreement Cloud for Salesforce.

At many organizations, the human side of digital transformation is often more of an afterthought. But for Flexential, a company that delivers secure and compliant IT infrastructure services, the people-side of tech is central to their success. This is why they know better than most the importance of using the right technology to transform a business.

For Flexential, their sales process was in need of a transformation. They had a homegrown quoting system and a third party contract lifecycle management tool in place, but sales reps still struggled to customize complex quotes with the right products and terms, negotiations were slow and painful, and getting completed contract data where it needed to be was manual and error-prone.

Now take the complexity of that scenario and double it--which is precisely what Jason Rader, Senior Director of Operations, faced when the company went through a merger.

### A tactical and scalable tech stack for agreements.

Clearly, the post-merger company needed a better way to manage complex agreements through the sales process. According to Rader, DocuSign was at the top of the list because of their industry-leading uptime guarantees and seamless integration with Salesforce, where their sales team lived.

Flexential rolled out DocuSign eSignature and CLM for Salesforce Sales Cloud and CPQ. "With DocuSign, we were able to absorb the two companies' agreement processes and see better efficiency with reps never leaving Salesforce," Rader says. "Sales can now create highly complex custom quotes with a click, send them out, and get through redlining and negotiation easily. All while tracking status along the way. They love it and we love it."

### Complex workflows simplified.

Coming from a background of process improvement, it's not surprising that one of Rader's favorite features of DocuSign CLM for Salesforce is workflow automation. "With drag-and-drop, we're creating and maintaining complex workflows almost entirely without developer support," says Rader. "We've been able to get creative with our workflows. For example, when a customer buys a services package online that requires a Letter of Authorization (LOA), we set up a smart rule that moves the LOA from the sales portal to the right folder in the opportunity automatically."

Taking advantage of another integration with ServiceNow, Flexential also created a smart rule that ties Salesforce opportunities to work orders, so all parties can access the information they need, without additional licenses.

## Results

**25%**

or more reduction in sales cycle

**Zero**

document errors

**75%**

fewer manual transactions

**80%**

of the Quote-to-Cash Ops teams' time is now focused on higher value activities

**Significantly reduced**

developer support needed to create and maintain complex workflows

**"DocuSign has shortened our sales cycle by at least 25% in large part because we now use DocuSign CLM to create our contracts instead of copying and pasting custom product details and other terms. It's also especially convenient for our customers who are always on the move because they can securely sign anywhere, 24x7."**

**Cheryl Kleiman**

Regional Vice President of Sales at Flexential

## Speed, visibility, and control without leaving Salesforce.

Now that Flexential has an all-in-one solution within Salesforce, the sales process is centralized, accessible and transparent. According to Rader, “We went from an unstructured and complicated file share to a connected and searchable repository.”

With a centralized system of agreement, Flexential has eliminated risks like lost contracts, substantially increased partner sales by authorizing appropriate access, and kept on top of upcoming renewals. All of this has meant a better experience for the sales team and, most importantly, customers.

## Focusing on the future with DocuSign.

Flexential now runs a larger business with 2 people spending 25% of their time managing paperwork compared to 3 dedicated team members previously. Since automating how they prepare, sign, act on, and manage agreements, the sales process has been much more efficient. And this is just the beginning for Flexential. “DocuSign has made us so much more nimble and able to adapt to change, and we’re looking into new ways to innovate with them across the whole business even outside of the sales process,” according to Rader.

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**“The ability to quickly find and analyze relevant contract details has helped identify exceptions, risks, and obligations. This new insight means we can proactively change key thresholds, pricing and other deal terms to grow our business faster.”**

**Dan Baker**

Manager of Quote to Cash Operations at Flexential

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### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world’s #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people’s lives.

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