

Salesforce

Salesforce Delivers Value Faster with a Modern System of Agreement

With a record of continuous high growth, here's a closer look at how the CRM company drives speed and efficiency using a modern system of agreement.

With well over \$10 billion in revenue, serving more than 150,000 customers, and plans to grow 100% in the next few years alone, Salesforce needs no introduction.

Since they began the cloud software movement in 1999, Salesforce has revolutionised CRM software with cloud technology. Today, Salesforce helps its customers use the cloud to improve the way they interact with their customers across sales, service, marketing, and more.

Key to the company's continued success is its "trailblazer" ethos: Just as its co-founder/CEO Marc Benioff sparked a cloud revolution by challenging the status-quo, Salesforce encourages employees to innovate, whether they're a top executive or entry-level employee.

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EVP & GM of Salesforce Essentials
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“We really challenge ourselves,” says Meredith Schmidt, EVP & GM of Salesforce Essentials and SMB at Salesforce of the “trailblazer” mentality “How do we do business differently?”

Schmidt embodies this “trailblazer” spirit. When she joined Salesforce, it was experiencing a period of rapid growth. But with that growth came challenges—including a flood of agreements (including things like sales contracts and onboarding documents) to prepare, sign, and act upon. Unfortunately, Salesforce’s legacy system of agreement meant the more agreements Salesforce initiated, the more process-related work its employees faced. Schmidt set out to make a change to help Salesforce continue its mission to revolutionise software—without the overhead.

Schmidt’s solution?... “I said, ‘I must have DocuSign.’”

Automating Agreement Preparation

Like any company, Salesforce runs on agreements. And, like most companies, preparing those agreements used to be a cumbersome, manual process. Each contract required thirteen different steps – from getting the quote approved to manually entering information, and more. Sales teams, rather than working leads or closing deals, were wasting time managing agreement preparation and processing. Multiplied across thousands of salespeople, it wasn’t sustainable.

So, Schmidt and her team made a change by implementing DocuSign.

Today, rather than completing thirteen manual steps to prepare an agreement, Salesforce has integrated DocuSign directly with their CRM and CPQ platforms. Now, each agreement is automatically populated with relevant data, such as products and pricing. This saves each sales rep an average of 10 minutes per agreement. Spread across thousands of reps and even more agreements, this means a massive improvement in the amount of time reps spend selling versus time previously spent focused on administrative work.

Automating the agreement preparation process also improved agreement accuracy. “I’m not re-keying data,” Schmidt explains, “I don’t have a potential

human error because the integration is automating the data entry for us.”

Finally, the direct integration between DocuSign and Salesforce means their reps never have to leave the CRM environment to create agreements—giving the sales team even more time because they avoid switching back and forth between technology platforms.

Signing More Deals, Faster

Any sales leader will tell you, “Time kills all deals.” To cut down on contract turnaround time, Salesforce leverages DocuSign for eSignature, which ensures 90 percent of Salesforce’s agreements are signed on the same day they’re sent, and 71 percent within one hour.

But prior to modernizing their system of agreement, Salesforce was no stranger to the waiting game. Rather than hours, it took an average of two days to see contracts signed. Instead of finding new leads, reps monitored contracts-in-progress and reached out to customers to remind them to sign. This wasn’t just frustrating for salespeople eager to hit their quotas—Schmidt and her colleagues in management also lacked visibility into the progress of different agreements. Once a rep hit send on a contract, the document seemed to disappear into what the team at Salesforce referred to as, “the black hole.”

With DocuSign, reps deliver agreements to the customer electronically, with signature fields pre-populated. The platform even automates the workflow of approvals. For example, an agreement can progress from the primary contact, to procurement, to the CFO for final signature—all in seconds. All the while, Salesforce can monitor the progress and eliminate the uncertainty for management.

“It’s my secret sauce,” Schmidt says of DocuSign—and that quickly became true for Salesforce’s entire sales team.

Automation For A Better Customer Relationship

Anyone at Salesforce will tell you the signature is just the start of the customer relationship. One of the most important steps in building a strong relationship is ensuring customers have access to the Salesforce platform as soon as possible after the agreement is signed.

Provisioning the customer account used to be a slow, manual process. Today, when the agreement is signed, it automatically initiates a workflow to provision an account immediately. This allows the customer to access the platform without delay and Salesforce can recognise revenue faster.

Salesforce also automates the process of billing the customer by capturing purchase order information during the signing process. Heather Atkinson is VP of Revenue Operations, Products and Pricing at Salesforce, and worked closely with Schmidt for the implementation of DocuSign. She says she saw the benefits of this feature then—and ever since.

“85 percent of our sales agreements are now no-touch,” Atkinson says. “That means they get done far faster, at less cost, with fewer errors.”

A Modern System of Agreement Propels Salesforce Forward

Salesforce continues to accelerate their business with the help of a modern system of agreement from DocuSign. The company is delivering the value of their products to customers faster while freeing up sales reps so they can focus on developing relationships with their customers.

“All of us have agreements every day—professionally and personally,” Schmidt says. “When I first started using DocuSign, I thought of it as an eSignature platform. But, when we started implementing, I realised it was so much more than that.”

Salesforce’s ambitions to revolutionise the way businesses interact with customers continues to grow. Supported by internal trailblazers like Schmidt, the company shows no sign of slowing down. And, armed with a modern system of agreement through DocuSign, Salesforce doesn’t miss a beat.

“If you put Salesforce and DocuSign together, it makes business go faster,” Schmidt says. “It’s one of those things that I call a no-brainer.”

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About DocuSign

DocuSign helps organisations connect and automate how they prepare, sign, act-on, and manage agreements. As part of its cloud-based System of Agreement Platform, DocuSign offers eSignature—the world’s #1 way to sign electronically on practically any device, from almost anywhere, at any time.

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