Blazing New Trails at Salesforce with DocuSign Agreement Cloud

With well over $10 billion in revenue, more than 150,000 customers, and plans to grow 100% in the next few years alone, Salesforce needs no introduction. Driven by a mission to improve the way organisations interact with their customers, the company is now the largest cloud CRM company in the world.

A key to the company's continued success is its “trailblazer” ethos. Salesforce encourages employees to innovate, whether they're a senior executive or an intern.

It was this pioneering mentality that inspired Meredith Schmidt, EVP & GM of Salesforce Essentials and SMB at Salesforce, to seek out and partner with DocuSign. When she joined the team, Salesforce was experiencing high sales volume growth that came with a number of challenges – including a flood of contracts and customer onboarding documents. Salesforce’s business was full speed ahead, but its agreement processes couldn’t keep up.

Schmidt needed to find the best solution to support Salesforce's growth. That's when she discovered the DocuSign Agreement Cloud and integrated DocuSign directly within the Salesforce platform streamline the sales agreement process and improve the customer experience.

“85 percent of our sales agreements are now no-touch,” says Heather Atkinson, VP of revenue operations, products and pricing at Salesforce. “That means they get done far faster, at less cost, with fewer errors.”

A seamless user experience

Nobody said blazing a trail was easy, but Schmidt was ready to get her hands dirty. Her first order of business was improving the cumbersome agreement preparation process, which required 13 different steps. Rather than working leads or closing deals, sales reps were wasting time managing mundane, administrative tasks, like manual data entry.

Multiplied across thousands of salespeople, this wasn't sustainable.

By integrating DocuSign directly with Salesforce’s CRM and CPQ platforms, Schmidt and her team were able to save sales reps an average of 10 minutes per agreement. Now, each agreement is automatically populated with relevant data, like products and pricing. Sales reps never have to leave the CRM to create agreements – everything they need is in one place. Not to mention, automation has also made agreements more accurate with less risk of human error.

Results

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Case study

Salesforce

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Signing more deals, faster

Any sales leader will tell you, “Time kills all deals.” Before DocuSign, the process of getting contracts signed took around two days. Instead of working on new deals, reps were monitoring contracts-in-progress and sending out reminders to customers. And management lacked visibility into the agreement process. Once a rep sent a contract, the document disappeared into a black hole.

DocuSign eSignature helped Salesforce cut down on contract turnaround time and increase transparency. Today, 90 percent of Salesforce’s agreements are signed on the day they’re sent, and 71 percent are signed within one hour. The platform also automates the approval workflow, allowing, for instance, a contract to progress from the primary contact to the final signer in seconds. Meanwhile, Salesforce leadership can monitor progress within the DocuSign Agreement Cloud.

Strengthening the customer relationship

The signature is just the first step in any customer relationship. And once you initiate the relationship, you can begin to strengthen it. At Salesforce, part of that means ensuring users can access the platform as soon as they sign the agreement. Thanks to DocuSign integrations, every signed sales agreement now automatically initiates a workflow to provision a new Salesforce instance. This allows the customer to access the platform without delay, and Salesforce can recognise revenue faster.

As Salesforce continues to accelerate its business, DocuSign has empowered the organisation to deliver products to customers faster while freeing up sales reps so they can focus on what really matters: building and developing relationships.

“If you put Salesforce and DocuSign together, it makes business go faster,” it’s a no-brainer.”

Meredith Schmidt
EVP & GM of Salesforce Essentials and SMB at Salesforce