

DocuSign for Salesforce modernise an ageing environment for Arcare

Moving into aged care can be an enormous and stressful transition for residents and their families – and that’s without considering sometimes decisions have to be made very quickly as a result of medical incidents. As a family-owned business themselves, Arcare focuses on making this process as easy as possible.

Since its first aged care residence was built in 1997, Arcare has grown to encompass 40 locations throughout New South Wales, Victoria and Queensland. Its residences welcome more than 1,500 new permanent and 1,000 temporary residents each year.

Arcare's philosophy focuses on a “Relationship-First Approach,” nurturing the wellbeing of everyone involved – residents, family and staff. Simplifying an admission process that requires many forms, signatures and notes, is key to doing exactly that.

Spending less time with paper means more time with people

There's a vast amount of paperwork involved with moving into aged care.

For family members completing it on behalf of an elderly relative, endless paperwork only adds confusion and stress to what is already a difficult time, especially if time is tight or they are visiting from a different city. And, despite an overwhelming amount of paperwork, attention to detail is critical to ensure the right details are included every time. From a client's personal details to health record to room number, the same forms are typically completed and printed numerous times.

As one of Australia's most innovative aged care providers, Arcare is constantly looking for ways to add additional levels of service and support for clients to help make the transition as seamless as possible. During a lightbulb moment by the printer, a procurement manager identified paperwork processes as a key area for improvement, inspiring Arcare's decision to implement DocuSign.

As an easy-to-use solution with clear cost and productivity savings, DocuSign usage at Arcare has organically grown from department to department. The procurement team was the first to roll out the solution and because of its seamless integration with Salesforce, it quickly spread to other teams including Sales and Marketing.

Results

Before DocuSign

Paper-based processes were inflexible and environmentally harmful

Admin and sales teams were spending unproductive time on paperwork

Paper-based compliance was slow and resource-intensive

After DocuSign

DocuSign will enable Arcare to save approximately 100,000 pieces of paper per year by hopefully digitising 80% of contracts and forms, boosting environmental impact and saving time and money.

DocuSign for Salesforce automatically populates all forms to ensure the right client information every time.

DocuSign will allow Arcare to do business faster, with less cost. Paperwork can be uploaded from anywhere and indicates when forms are completed in real-time.

Replacing repetition with flexibility and efficiency

By using DocuSign for Salesforce, Arcare has streamlined the data-entry process, empowering clients and staff to manage paperwork in a flexible, agile way. The DocuSign and Salesforce integration means that client information, including move-in date and contact information, is populated directly from Salesforce.

For a client's family member who works 9am-5pm, finding time to physically collect, complete and return paperwork is problematic. Couple this with the fact that family members often live in a different city or state to the relative and selected Arcare residence, and paperwork was an issue before the client was even in the door. With DocuSign, contracts will be dispatched easily by sales teams and completed by family members from mobile devices or on their computers, with the ability to check, confirm or request changes on the spot.

Automating workflows also helps clients and employees work more efficiently. Data is pulled from, and updated into, Salesforce to ensure it's correct. The solution automatically populates the same data across every client form. Previously, time was spent manually entering the same information multiple times while switching between tools, which was more likely to result in error.

Looking after the elderly and the environment

Meeting regulatory and compliance obligations means Arcare needs to have the correct technology to work efficiently and reduce risk. For example, Arcare requires legal documentation prior to a resident moving in. By using DocuSign, applicants will be able to sign paperwork anywhere, anytime, and it's immediately uploaded to client records on Arcare's side.

"It can be a complicated process when it comes to completing aged care forms and agreements. Depending on the type of care, we could require up to four different signatures on the client's side. Integrating DocuSign with Salesforce was extremely straightforward and it will be invaluable in enabling us to streamline the process to allow for multiple signatures."

And the environment feels the benefit too. Arcare is expecting to save approximately 100,000 sheets of paper per year as a result of digitising paperwork.

Arcare has successfully trialed DocuSign for Salesforce across its residences in Victoria, leading to 80% of Arcare's paperwork being completed digitally. Given some aged care clients don't have an email address, 20% still use hard copies. Arcare is currently looking at expanding its usage interstate to share the success of the solution throughout the organisation.

"Our staff have embraced DocuSign for Salesforce because it's saving them time and increasing their team's productivity. One of our Victorian sales representatives is now training different teams interstate. The next step in our DocuSign journey is to roll out the solution in Queensland."

"From a change management and paper reduction perspective, DocuSign is an easy sell into the business because the benefits are so obvious. As soon as our procurement manager identified DocuSign as a way to streamline paperwork we set up a trial. She was a strong internal advocate for DocuSign's capabilities, providing demonstrations to every business department she could, from sales to admin to HR. The benefits around saving time with suppliers and clients were clear immediately."

Nathan Torrens
Marketing Technology Lead
Arcare Aged Care

Arcare has successfully trialed DocuSign for Salesforce across each of its residences, with the sales team members currently preparing all paperwork as hard copy versions to complete. Given some aged care clients don't have an email address, Arcare requires both hard copy and electronic processes in DocuSign for Salesforce to meet the customer's needs and situation. Arcare is currently looking at completing more training with the sales team members to start sending the electronic versions shortly.

We wanted to implement DocuSign for Salesforce in stages so the sales team members felt comfortable progressing into each stage and using the system. One of our Victorian sales team members is now trialing the electronic process and we're almost ready to start implementing it throughout the rest of Arcare's residences."

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About DocuSign

DocuSign helps organisations 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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