xRM Accelerates Agreement Processing with DocuSign Integrated with Microsoft Dynamics

Summary

- Cut agreement processing time from hours to 2 minutes

- Automated data updates in Microsoft Dynamics CRM

- Accelerated ability to provide services to customers

A Microsoft Partner providing Microsoft Dynamics CRM, xRM offers application hosting, software development and consulting services. To support sales of its services and training packages for Microsoft Dynamics CRM Online, xRM implemented DocuSign integrated with its own Dynamics CRM via the DocuSign API. DocuSign has helped the xRM expand its offerings, provide enhanced customer service and increase profits.

Challenge

Intending to turn their training packages into a high volume business, xRM needed a method to streamline the processing of agreements. Using a paper-based process, the time and expense of printing, faxing, scanning, mailing, filing, and data entry would render training packages unprofitable. It could take several days to get an agreement signed and returned, which meant additional time before xRM could provide service to customers, delaying customers' ability to take advantage of their new CRM system, not to mention delaying revenue for xRM. xRM was looking to drive increased efficiency for these small consulting arrangements, expand its range of services for small businesses, and ensure a comfortable profit margin by reducing the manual labor associated with preparing and sending its standard consulting agreements.

Solution

xRM discovered DocuSign and saw how electronic signature would dramatically accelerate and streamline the processing of agreements and other signature needs.

xRM subsequently determined it could use the DocuSign Application Programming Interface (API) to also update data that resided in its Microsoft Dynamics CRM system.

> " On average it now takes us two minutes to prep and send an agreement for signature with DocuSign, including any special pricing, terms, or additional arrangements. "
>
> **Owen Scott**
> Chief Information Officer

Results

xRM initially implemented DocuSign from the DocuSign web console, which let xRM's sales team start DocuSigning immediately to accelerate the process of getting agreements completed.

"Then we realized that we needed to configure the agreements with information that was already stored in CRM," said Owen Scott, chief information officer at xRM. "We decided to use the DocuSign API to build an integration tool that could access the data in CRM and allow us to send DocuSign agreements directly from our CRM system quickly and easily."

While xRM's initial implementation of DocuSign accelerated the signing process from days down to one hour; the integration of DocuSign with Microsoft Dynamics CRM accelerated the end-to-end process to just a few minutes, providing even greater ROI.

"The DocuSign API was extremely easy to use, with plenty of code samples available," said Scott. "Their developer team offers excellent support, and we were able to create a powerful integration with a well defined process for certification."

"DocuSign has really helped that part of our business. We now use DocuSign to send all our contracts and

other agreements. It is so simple and fast," said Scott.

In fact, xRM valued DocuSign so much that the company launched xSign, to harness Microsoft Dynamics CRM, DocuSign, and Microsoft SharePoint to help companies close deals more quickly by automating document generation and document signing. xSign is a plug-in for Microsoft Dynamics CRM.

"xSign increases productivity by hastening the generation of important business documents, automating their delivery to customers, supporting the remote DocuSigning of those documents, and enabling the tracking the status of each document from start to finish," said Scott. "The combination of xSign and DocuSign allows us to operate more efficiently and increase our margins on all our service offerings."