



A Case Study on Salesforce DocuSign Integration

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Who Are We?



SP Tech is a Salesforce success partner, helping businesses across the globe-to Develop, Sustain, and Manage the digital ecosystem for years now.



We were established in 2015, currently working across the USA &

India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.



Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

Project Description

SP Tech was required to implement Salesforce Sales Cloud – DocuSign Integration for a Financial Service company providing employee benefits. This integration was needed to help in drastically improved as well as automated Business Processes, and accelerated contract signing.



Industry
Financial Services



Products
Salesforce Sales Cloud
DocuSign

About Our Client

Our client is a Boston-based employee benefits company with more than 50 years of expertise in the domain. They connect millions of employees and thousands of companies across the globe. It's one of the leading comprehensive pre-tax commuter benefits in the US.

Challenge(s)

Client's business process as well as productivity were being affected owing to the slow contract signing process. Be it time requirement, or resources needed to complete the process, everything made the process cumbersome.

Solutions

We offered DocuSign Integration for Salesforce to automate their contract signing process. We offered automated and accelerated contract signing.

The following processes were needed to be automated –

- Generation of the contract using a template
- Updating the contract with client information
- Sending the contract to get all approvals

Technical Approach

SP Tech implemented and integrated DocuSign with their Salesforce seamlessly. With a complete configurable process, we provided them with the below features.

- **Contract Template** – A contract template can be reused again and again.
- **DocuSign Tabs** – Create tabs in a Document. Merge field will be placed on a document that gets replaced from the SFDC Data.
- **Signer** – To define Signers and Ordering of the Signers.
- **Rule Engine** – To determine which template needs to be picked if a rule got evaluated as true.
- **Contract Wizard** – To preview the contract before sending a document.
- **Reports** – To keep track of all the generated contracts and their status and win rate and commission for Sales Reps.

Benefits

- With Salesforce DocuSign Integration, all the Sales reps had to do one click.
- The end-to-end automation process took care of the entire contract signing.
- Once prepared in Salesforce, the contract was sent to DocuSign by gathering the recipient information and routing rules to send a document for signature.
- Once signed, contract signature statuses were integrated back into Salesforce.
- Apart from these, the overall process was smoother, resources utilization was efficient, productivity & ROI was increased, experience was improved and much more.

Results

Not just our client's business process was streamlined with online contract signing using DocuSign integration but also there were many more benefits offered. Salesforce DocuSign Integration resulted in:

- Simplify the experience
- Sending contracts from within Salesforce and enabling signing contracts from anywhere, at any time.
- Increased Productivity by 22%
- Decreased workload for resources, easier signing for customers, and increased ROI.
- Seamless Management
- Monitor all DocuSign Transactions within Salesforce
- 24% reduction in contract closing turnaround time
- Faster document turn-around times, increased accuracy, and a more streamlined sales process.

**THANK
YOU!**

