



Leading skincare and aesthetic technologies company leveraged DemandBlue's On Demand Services to enhance their sales cycle

Client is one of the top skincare and Aesthetics Company in the US

Challenge

Client manufactures skin rejuvenating products. They have a fleet of around 3000 sales reps whose job it is to contract providers for their product. To onboard a provider, the sales rep will manually prepare a contract, fill in the data, and send it to the provider. The provider in turn will fill in the contract, sign, scan, and mail the contract back to the sales rep. This manual process was time consuming and inefficient and the customer experience was not encouraging. Tracking the contract sign status and maintaining the completed contract documents was a constant headache. The client wanted to check if this contract process can be improved.

Technology/Environment: Salesforce, DocuSign by Salesforce.

Solution

When the client reached out to DemandBlue, they were engaged through the cost-effective and agile On-Demand Services (ODS) model. An account manager initiated an immediate assessment of the client's environment by the DemandBlue's ODS Advisory Team. The team understood that the maximum time was utilized to manually fetch data from Salesforce and enter them into the contract and also while the customer signed and scanned the contract. Their solution was quick and clear and it was to integrate Salesforce with DocuSign to shorten the sales cycle, increase close rate, productivity, and create a better customer experience.

The development team came up with a solution to completely automate the designing, data fetching, signing, tracking and maintaining of contracts. It was a simple and effective end-to-end automation implemented by integrating Salesforce with DocuSign and adhered to the best practices set by the Global Standard for Digital Transaction Management.

- Created contract template with all relevant fields
- Pull out required data (Names, PO numbers, etc.) from Salesforce and auto-populate in the contract
- Send the contract by clicking from any "object"
- Document was enabled to handle multiple levels of signing authority
- Confirmation mail triggered to stakeholders on signing of contract
- Signer preference order can be set up as workflow for the contract
- Specific fields were made editable to enable quick edits as per renegotiations with customers
- The whole process can be completed from any mobile device

Benefits

- The new integration save a huge amount of time on contract process - 90% of contracts are signed on the same day, 71% within an hour, and 60% within 15 minutes
- It eliminated rekeying of data and increases productivity
- Stored contracts securely for easy auditing later
- It enabled users to sign docs from anywhere, anytime and on any device
- This resulted in faster deal closures and improved ROI