



# Box Closes More Sales in the Cloud with DocuSign

## Summary

- Improved efficiency of the contract execution and submission process across the sales organization.
- Automated workflow and business processes across multiple departments by integrating with Salesforce.com.
- Experienced Productivity from Anywhere, keeping content centralized on Box while extending electronic signature capabilities.

By enabling simple, secure sharing and collaboration from anywhere, Box is has grown to 11 million users, from individuals to small businesses to the Fortune 500. Box implemented DocuSign as part of its Salesforce-powered sales process, resulting in significant time savings and customer satisfaction—all with a scalable solution.

## Challenge

When it was still only known as a startup, Box's contract execution process was sub-optimal: account executives sent quotes and contracts to customers, waiting for them to print, sign, and deliver the contract back to Box. The need for greater visibility into contract status across the organization became increasingly apparent.

Upon receipt of a signed agreement, downstream workflow began but it was very manual. Content was not integrated into the sales operations, billing, support, and professional services processes at Box. The resulting inefficiencies were a drag to a fast-growing and innovative technology company like Box.

Additionally, like many companies, Box had an increasing number of employees working remotely, traveling, and working from their mobile devices. Box already had a great way of accessing critical content from any mobile device, through the use of its own service, but needed to extend the workflow process by signing and sending contracts from anywhere.



“Our real savings has been the amount of time saved in aggregate thanks to DocuSign.”

**Matt Norton**  
Sales Engineering Manager, Box

## Solution

Box uses Salesforce.com to manage its growing customer base. Box wanted a solution that was deeply integrated with its CRM and with the Box application itself. It needed to be easy for account executives and prospects to use—as would befit the Box brand. And finally, Box needed a solution that could accommodate its mobile workforce.

## Results

Box implemented DocuSign as an integral part of the sales process. Once a contract is executed, DocuSign for Salesforce automatically initiates a workflow process within several other departments. Using the Box API, each signed agreement is routed automatically to a unique folder in Box, triggering notifications to sales management, sales operations, client services, and billing. With DocuSign, Box automated its processes to achieve scalability simply.

Box employees can now comment on the document within Box, or assign a task to others who have access to the content, facilitating further workflow. The company now has a complete, streamlined contract execution and review process that leverages Box and DocuSign's industry-leading technology.

“Our real savings has been the amount of time saved in aggregate thanks to DocuSign,” said Matt Norton, sales engineering manager at Box. “DocuSign not only helps our account executives close a great number of deals but accelerates the pace at which we're able



to operate. Additionally, it's allowed our employees to simply work from wherever they are—be it from within from Box, from Salesforce.com, from DocuSign, or from a mobile device.”

Just as important, Box is using DocuSign to provide customers with an easy way to execute an agreement, which often requires numerous signatures and/or sequential signing. Every application Box uses across the organization has to represent Box in a highly professional manner, and offer the simplicity that their customers expect. DocuSign ensures they meet and exceed that expectation with an easy, fast, and secure way to get a signature.



The Global Standard for Digital Transaction Management™

#### About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management™. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

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