



Community Energy Fuels Sales with DocuSign for Salesforce

Summary

- Significantly reduced contract turnaround time
- Integrated directly into Salesforce, streamlining contract workflows
- Able to route contract to numerous signers simultaneously to expedite complex group-rate contracts

Community Energy, L.P. is a licensed aggregator of electrical power, serving residential, small business, commercial and nonprofit power users throughout the State of Texas. As an aggregator, Community Energy helps large groups combine their buying power to lower electrical rates from existing power providers. Community Energy has helped business and residential customers benefit from reduced electrical costs since 2002.

Challenge

In the deregulated energy industry in Texas, customers can select which utility provides their electricity. Often rates fluctuate rapidly over short periods of time. So while Lone Star State residents and businessowners can hunt for competitive prices, like any shopper, they do not like losing their chance at the best deal. When the company takes on new clients, they must sign contracts allowing Community Energy to represent them, as well as agreements between themselves and their chosen energy supplier. In many cases, clients include large residential communities, in which members pool their electricity usage to obtain a better rate—a deal requiring signatures from all residents.

Scott Chilton, president and managing partner at Community Energy, often found that the necessary paperwork took quite a while to prepare, and once it was delivered through standard mail, clients were slow to respond. In the meantime, oil-and-gas rates rapidly changed and wording on the contracts needed to be revised. As a result, customers sometimes lost out on their preferred deal, and Community Energy suffered slower-than-desired close rates and added administrative



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pains to rework contracts. Unfortunately, the contract process to select a power provider can sometimes lead to losing a good deal, says Scott Chilton, president and managing partner of Community Energy. “We’ve had cases where the sales rep talked to the customer about a rate,” he says. “By the time the paperwork was done and the contract sent, the rate was no longer any good and they had to go back and redo the contract again based on new market information.”

Solution

Community Energy reversed this business problem with a solution from DocuSign, the leading electronic signature service. Community Energy deployed DocuSign’s Corporate Edition Enterprise eSignature solution, integrated into Salesforce to better control and reduce the time of the contract signing process. Since employing DocuSign, Community Energy has significantly accelerated the process of getting contracts signed and sales finalized, Chilton says.

Results

The ability to synthesize DocuSign with Salesforce has been of significant benefit for Community Energy. As Community Energy employs Salesforce as its customer relationship management (CRM) platform, integrating DocuSign has produced a seamless workflow.

Now contracts travel quickly from salesperson to customer to power supplier, Chilton says. Community Energy can also leverage the DocuSign integration to achieve a number of other business benefits. One of the primary benefits is in contract creation. By being able to draw up contracts using DocuSign codes and customer data already stored in Salesforce, Community Energy is able to cut down on data-entry errors.

"You're just extracting that information and plugging it into the agreement," Chilton says. "DocuSign's integration with Salesforce allows us to quickly generate documents and distribute them to the customer for execution and then get them moved on to the supplier to book the energy," he says. "It immediately goes from the customer's office to the supplier so there is a very little gap in time for the market to move. DocuSign helps the customer lock in a rate at a low price and ensures that it gets preserved even if the market is moving quickly."

Chilton says the DocuSign service is easy for customers to use and clearly delineates to what they need to sign on a specific document. Plus, the customer has on-demand access to the contracts, which bolsters document retention capabilities for Community Energy and lends legitimacy to the process for the end-users.

"When you're relying on a lot of different sales agents, sometimes they don't effectively communicate to the customer that they have to sign this particular clause or it's not going to be accepted," Chilton says. "DocuSign does a great job of making sure the customer understands they are committing to an agreement and that agreement is legal and binding, and then providing them with a mechanism for signing and viewing that contract."

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.

For U.S. inquiries: toll free 866.219.4318 | docusign.com

For EMEA inquiries: phone +44 203 510 6500 | email emea@docusign.com | docusign.co.uk

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