



Drawloop Fast-Tracks Sales with DocuSign for Salesforce

Summary

- Reduced turnaround from days to hours
- Integrated contract creation and execution into Salesforce interface
- Enabled sales team to start the contract execution process sooner
- Allows staff to more easily access archived contracts

Since 2002, Drawloop Technologies, Inc. has grown to become one of the leading on-demand document automation solution providers on the market. Drawloop allows customers to take native files (or original source files) to quickly and automatically create sales quotes, proposals, presentations, sales contracts and more within Microsoft Word, Excel, PowerPoint and PDF files and custom package those documents to their needs. Drawloop allows customers to wrap rules around documents and merge data quickly.

Challenge

Drawloop's core offering is its document automation technology. But according to Jim Roberson, co-founder and president of Drawloop, the company needed a final piece of the puzzle to enable the full cycle of contract management. "You might automate your quote, your proposal, your marketing collateral and so on during the sales process and none of that—with the exception of maybe an NDA at the beginning of the process—typically needs an executed signature," he says. "So you've done all of this automation, but when you get to the last step of the sales process, which is how you get paid and how you close business, you're missing a key element of the automation if you don't offer that electronic contract execution at the end of that process."

Drawloop looked for a technology partner that not only allowed it to integrate that contract element puzzle piece into its solution for customers, but also for internal Drawloop use as well.



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President & Co-Founder, Drawloop Technologies, Inc.

Solution

Drawloop chose to partner with DocuSign because of the company's robust electronic signature workflow technology. "We see DocuSign as the last step of document automation—and one of the most critical," Roberson says. "It was natural for us because for a lot of documents that we automate, merge and package, the next step is to get those executed and that's where we found a nice fit and synergy with our service and the DocuSign electronic signature service."

Drawloop integrated its solution into DocuSign to allow its salespeople to pull data directly from Salesforce in order to auto populate an e-signature enabled contract. Once the appropriate data and signature fields are merged into the contract document, the salespeople are able to manage routing to multiple signers and receive missing or updated contract information directly back into the Salesforce database.

Roberson says one of the key differentiating factors of the DocuSign technology is its capability to capture data during the signing process. "DocuSign is substantially unique from other options because most of the time if you're missing data you need to pick up the phone, call them, email them and try to get all of that data before you can send it out for signing," he says. "With DocuSign, this hassle is totally eliminated."

Results

DocuSign's inherent ease-of-use enabled Drawloop to dramatically reduce its contract turnaround time. "When we have a customer who's decided to move forward, we can send that contract via the DocuSign process. Just by the very nature of how much easier DocuSign is to get a document signed, get it completed and get it archived, DocuSign allows us to go from a couple of days or even a week, down to literally hours to get a contract executed." Even more importantly, though, Roberson believes the greatest benefits Drawloop has reaped internally from its use of DocuSign included improved organization, automation and archiving of contracts.

"What's been nice is being able to generate the contract from within Salesforce using our Dynamic Document Packaging service, send it through the DocuSign e-signature process and get it all back in one location in Salesforce. That's been one of the single greatest benefits for Drawloop, because prior to DocuSign we were doing a lot of scanning of contracts and manual data entry back into Salesforce. We would lose data in that process and it also created a lot of extra manual steps that we had to do. That's all been eliminated with DocuSign."

Additionally, says Roberson, the DocuSign solution enables salespeople to start the contract signing process sooner. Rather than waiting for the customer to supply all of the necessary information before sending a contract out, sales staff can ask that the customer to provide this information directly within the appropriate fields provided within the DocuSign contract.

"With DocuSign you don't have to disrupt that signing process, they can just fix all of that on the fly," he says.

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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