



# 3 Ways You Never Thought About Using DocuSign with Salesforce

WEBINAR SUMMARY



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## WEBINAR SUMMARY

### Overview

The success of businesses is increasingly related to how they have adjusted to the digital transformation. Those enterprises that effectively leverage digital business processes have more efficient operations and higher valuations. Salesforce and DocuSign have created a platform of tools that enable businesses to accelerate their digital journey. These tools improve critical metrics for customers and partners. They also reduce internal costs, minimize paperwork, and increase efficiency.

### Context

DocuSign’s Joe Dillon described how DocuSign combined with Salesforce drives digital business efficiencies across enterprises. Mike Bogan from Traction on Demand and Erik Eisenman from AIG presented case studies showing improvement in engagement, speed to market, and cost.

### Key Takeaways

#### Digital transformation drives success.

Leading companies are digitally transforming their business processes inside and out. Leaders are improving margins by lowering costs and driving more revenue and profits, and have higher market valuations.

#### Organizations That Rank High on Digital Maturity

**13%**

More Revenue

**50%**

More Profitable

**19%**

Higher Market Valuation

Source: MIT Sloan Management Review and Deloitte’s 2015 Global Study of Digital Business

DocuSign has accelerated this digital transformation process by integrating with Salesforce. The combination is enabling businesses to reduce costs, eliminate paper, increase sales, and improve the customer experience.

#### DocuSign helps organizations digitize key decision and approval processes.

In helping enterprises digitize these key processes, DocuSign’s platform enables organizations to prepare, execute, and manage transactions.

- **Prepare.** DocuSign allows working with every document format—from Word to PDF to PowerPoint—and preparing it for signature.
- **Execute.** DocuSign provides a robust platform to handle policies and protocols for authentication. DocuSign supports execution in 43 languages.
- **Manage.** DocuSign enables managing from end to end, giving a 360-degree view—from internal employees to partners to customers—with analytics, tracking, and reporting tools.

#### The DocuSign Solution

##### DocuSign



#### DocuSign Trust Platform



DocuSign is the global leader in transaction management for the Fortune 2000 for three main reasons:

1. **Choice.** It works with the applications, services, and devices that organizations already use.
2. **Experience.** It is simple to implement, use, and manage.
3. **Trust.** It is the most reliable, globally trusted service for digital transactions.

## The integration of DocuSign and Salesforce provides value internally and externally, for multiple functions.



DocuSign and Salesforce are integrated across the Salesforce portfolio of tools:

1. Sales Cloud – for sales professionals, who must frequently get documents signed.
2. Service Cloud – for call center, contact agents, and internal team members who frequently engage in transactions requiring signatures.
3. Functional dashboards – internal employees in functions like HR, legal, or procurement have dashboards for their functional role, providing information they need. Integration of DocuSign and Salesforce improves employees’ efficiency.

“DOCUSIGN IS A PERFECT TOOL THAT SHOULD BE EMBEDDED SO THAT USERS STAY IN THE EXPERIENCE AS LONG AS POSSIBLE.”

— Joe Dillon

4. Marketing Cloud – for moving outside the enterprise firewall and connecting with customers.

Examples of use cases where organizations are benefitting from the integration of DocuSign and Salesforce include:

- **DuPont: Driving sales team digital engagement.** DuPont needed to motivate a change for a legacy team of sales professionals used to doing things the old way. By taking a key document—the purchase order—and dropping it into Sales Cloud, they saw a 3x improvement in log-ins from their team.



- Increased CRM usage internally by **300%**
- Reduced errors by **50%**

- **Salesforce: Accelerating purchase orders.** Salesforce itself has been cloud-based from its inception, but hadn’t fully integrated DocuSign and their own Sales Cloud instance. When they combined them into one workflow, they reduced the turnaround time for purchase orders from weeks to days.



- **90% documents completed in 1 day, 71% within 1 hour**
- Deployed across entire Sales organization

- **Cedars-Sinai: Starting clinical trials faster.** Cedars-Sinai is a large healthcare provider that engages in numerous clinical trials. Participants in trials must sign multiple documents. By making their process digital from end to end, they were able to improve efficiencies and accelerate trials—and since time-to-market means money where patents and expirations are key, this was a critical improvement for them.



CEDARS-SINAI®

- Reduced processing **turn around time** by **75%**
- Increased overall enrollment by **5x**

**Three elements of the DocuSign/Salesforce integration make it unique.**

These three elements are: Service Cloud, apps, and communities. They are illustrated with use cases from industries with different needs.

- **Fortune 500 global energy provider.** Before integrating Salesforce with DocuSign, this leading energy provider’s sales force had multiple physical documents in the field—part of an inefficient and outdated paper-based system. With Service Cloud and ServiceMax managing the workflow, sales people in the field could carry a single tablet to present pre-populated fields in key documents, capture signatures offline, and seamlessly upload once they were back online.

**Fortune 500 Global Energy Provider - Field Services**



- **Canadian telco.** Telus is the fastest growing Canadian telco, with hundreds of field reps going door-to-door to service and upsell existing customers; they also identify new customers by knocking on doors. Previously field reps needed to carry extensive documentation. By combining Salesforce and DocuSign, Telus created a flexible tool that captured geo-information about customers and allowed them to flip to a customer-facing app to show options and capture signatures. This was so effective that Telus replicated it in mall kiosks across Canada, producing a low-cost, high-impact experience, making a modern impression their customers liked.

“WHEN THERE ARE APPROVALS AND DECISIONS TO BE MADE, DOCUSIGN CAN COME TO LIFE WITHIN SALESFORCE.”

— Joe Dillon

**The integration of DocuSign and Salesforce impacts partner and customer experiences.**

Examples were shared of both a partner (Onward Insurance) and a customer experience (Fast Financial).

**Onward Insurance**

Onward is an insurance reseller with many partners to onboard. Partner enablement was arduous, with multiple emails back and forth. Information was cut and pasted from Word to PDFs, scanned with one-off signatures. Tracking happened in Excel documents that were not integrated, so there was no visibility for reporting. And all this work was distracting personnel from the critical step that actually added value: qualifying lead information.

*Solution*

Using DocuSign and Salesforce, Onward was able to create a completely digital e-signature onboarding process, providing visibility internally and the capacity to track intent to sell. Re-keying was eliminated, forms were pre-populated, and internal staff could focus on qualifying information. Workflow was automated, so staff could simply change a status in Salesforce from “lead” to “send paperwork”—and an automated email would be triggered, moving the onboarding to the next stage.

Onward also used Salesforce Lightning. What made this tremendously powerful for Onward is that all of these steps are mobile-enabled, so the team may execute on partner leads whether they are in the office or the field.

**Fast Financial**

Fast Financial provides customers the ability to sign up online for bank accounts. It is a complex process, with rules that vary from state to state, requiring customers to make decisions about which bank account to choose. Customer options depend upon the details of their situation, requiring different customers in different states and situations to receive customized offers.

*Solution*

DocuSign and Salesforce enabled Fast Financial to create a “product configurator” that dynamically delivers the relevant data to a customer based on what information they enter. It uses birth date, financial standing, and their state, among other things, to provide the appropriate options for the customer in real time. All data entered by customers is simultaneously provided internally on the Salesforce backend, for

internal visibility into lead records. This allows the Fast Financial team to review, qualify, and deliver automated emails to trigger the e-signature experience.

### *Additional Leverage*

Templates need to vary by state, so using the DocuSign API, Fast Financial was able to create separate templates on a per-state basis, enabling dynamically populated forms to be immediately delivered by staff, regardless of which state the customer is in.

“THE SYSTEM IS AUTOMATICALLY DELIVERING THAT CONTENT TO THE CUSTOMER . . . IT’S GOING TO ALLOW THEM TO REALLY GROW THEIR BUSINESS IN A WAY THAT IS EFFORTLESS FOR THE CUSTOMERS AS WELL AS THEIR INTERNAL STAFF.”

— Mike Bogan

## Other Important Point

- **SMBs also.** While this webinar focused on large enterprises, the benefits of DocuSign and Salesforce also apply to small and medium-sized businesses.

## Case Study: Changing the Customer and Employee Experience at AIG

### *Context*

AIG is one of the world’s leading insurers, with operations in over 75 countries. Last year, AIG paid out \$4.5 billion on about 3.2 million claims. At that scale, AIG needs a simple, hassle-free claims experience for customers and employees.

### *Problem*

In the current Travel Guard claim-filing process, for instance, the customer calls a center, learns what the process will be, answers multiple questions, and then sends in required paperwork, such as a credit card receipt or a ticket for a cancelled airline flight. This requires a great deal of time on the phone and separate delivery of physical documentation.

### *Solution*

With Salesforce and DocuSign, AIG built a tool that enables customers to interact with AIG whenever they want on any device. Instead of an initial phone call followed by AIG delivering a paper claim form, and the customer and AIG waiting for documents to arrive in the mail, the customer can fill out an online form and upload document photos from their phone or other device, and the system automatically produces a pre-populated form for them to review, edit, and e-sign.

### *Benefits*

AIG now has a simple, hassle-free process for the customer to file a claim, as well as a 30% reduction in call center volume.

“WE’VE ACTUALLY SEEN ALMOST A 90% REDUCTION IN THE CLAIM CYCLE TIME.”

— Erik Eisenman