

# Get The Most From Your CRM

Integrated apps add value  
to your bottom line





# State of the Industry: What is CRM Today?

In the last decade, customer relationship management (CRM) platform adoption has increased rapidly to meet the speed of business. Enterprises of all sizes and types are adopting CRMs as the norm.

While manufacturing, technology, and real estate account for around half of all CRM usage, virtually every segment of business is represented. Gartner Research predicts growth will continue or even speed up through 2016, with more and more smaller and midsize companies getting on board. Business News Daily points out that today's CRMs, especially Salesforce, can offer you "big business capabilities at a small business scale and price tag." These capabilities include the ability to dynamically scale based on

need and number of employees, easy-to-use mobile apps, low cost, high ROI, and little or no IT investment.

CRMs offer a single source of customer information and reduction in paper. Most importantly, they allow companies to do business more rapidly and with greater agility. This results in increases in operational efficiency, lead conversion, customer satisfaction, and sales revenues.

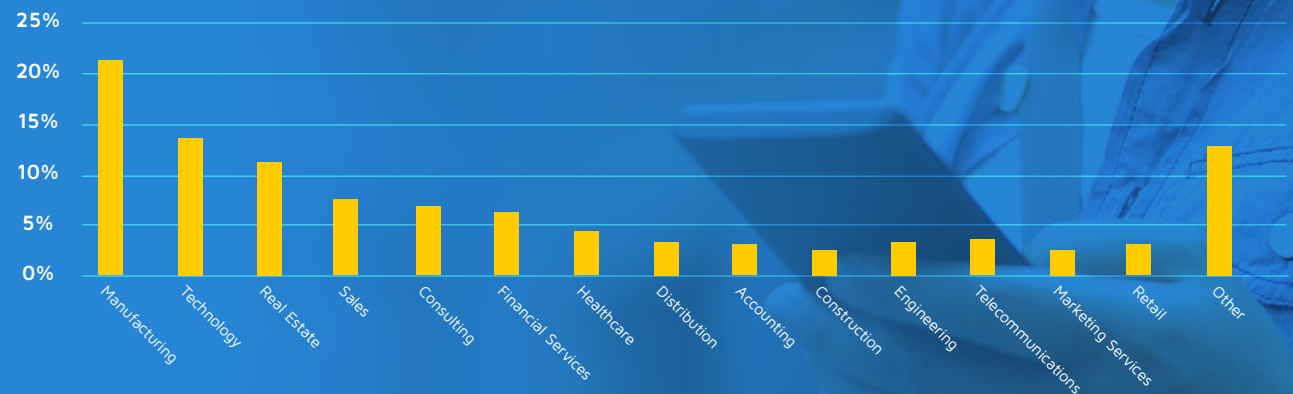
**"SaaS CRM deployments are here to stay, with over 70% of enterprises of all sizes having deployed all or some CRM, or planning to deploy CRM as a SaaS solution."**

— KATE LEGGETT, VP, FORRESTER

## CRM: The New Normal

CRMs today are no longer just a tool for big business. Businesses of every size are adopting CRMs as today's standard for smart business. And as the chart to the right illustrates, virtually every segment of business is getting on board. That's because, as Business News Daily points out, today's CRMs, especially Salesforce, offer "big business capabilities at a small business scale and price tag."



Who uses CRM?



Data source: SoftwareAdvice, "Customer Relationship Management Software UserView" | 2014.

# Extending CRM with Apps





In companies small and large, CRMs are used across the organization in:

-  Sales
-  Marketing
-  CIOs
-  Business Owners

Since there are millions of CRM users with different use cases and applications, companies often have customized CRM platforms built specifically to their needs. In addition, businesses can take advantage of thousands of business and social applications by integrating them into their current CRM systems. “CRM marketplaces

have experienced rapid growth, spurred partially through concerted efforts by Microsoft and Salesforce,” says Greg Pierce, cloud computing expert at Tribridge.

These thousands of apps enable users to integrate added functionality with the ultimate aim of creating an all-in-one solution specifically tailored to their business needs such as:

-  Marketing Automation
-  Real-Time Data Capture
-  Accounting Software
-  Customer Service/Support

Drew Robb at Enterprise Apps calls these integrations one of the top CRM trends for 2014 and beyond, writing, “CRM can no longer stand on its own.”

— SALESFORCE

## APP CATEGORIES AND CAPABILITIES

Imagine a business function and you’ll find an app that addresses it. Here’s a sample of some of Salesforce’s top featured apps with a brief description of the functionality each one can add to your CRM.

### Sales

**DOCUSIGN**  
Digital Transaction Management (DTM)

**APTTUS**  
Contract Lifecycle Management

**STEELBRICK**  
Configure, price, quote management

**DRAWLOOP**  
Document Creation and Management

### Customer Service

**SERVICEMAX**  
Field Service Management

**GETFEEDBACK**  
Online Surveys

**NEWVOICEMEDIA**  
Contact Center Integration

### Marketing

**FIELDKO**  
Field Sales and Marketing Management

**BIZIBLE**  
Marketing Analytics

**DADDY ANALYTICS**  
Marketing/Adwords Analytics

### IT & Admin

**ELTON**  
Equipment Location Tracking

**FORMYOUOLA**  
Mobile Form Creation

**ADDRESSTOOLS PREMIUM**  
Address Validation and Standardization

### Human Resources

**LEARNSMARTER**  
Training Administration

**JOBSCIENCE**  
Hiring and Recruiting Management

**M|PLOYEE**  
HR and Recruiting Management

### Finance

**FINANCIALFORCE**  
Billing and Accounting





**INVOICES FOR SALESFORCE**  
Invoicing and Billing



# Go Digital and Close the Deal

Digital Transaction Management (DTM) enhances the value of CRM by eliminating manual, paper-based processes. DTM enables faster speed to revenue, lower cost, increased security and compliance, and a better customer and sales rep experience. Led by DocuSign, the most popular electronic signature app on the Salesforce AppExchange, DTM enables preparation, execution, and management of transactions in an all-digital environment.

DocuSign's DTM solution's simplicity of implementation, broad functionality, and mobile-friendly application is a proven alternative to slow, costly, paper-based processes like:

-  Printing
-  Faxing
-  Scanning
-  Overnighting

By digitizing the most vital step of the customer relationship—closing the deal—companies can give their customers what they want, when they want it.

A wide range of organizations—including Salesforce—have embraced DTM as a key part of their CRM solution. They report faster execution, lower operating costs, significant reduction in errors, superior customer experience, and a strikingly high return on investment.

Leading tech research firm Intellicap reports ROI from implementing DocuSign's DTM solution **averages more than 300 percent**. In addition, Intellicap notes more than a **61 percent increase in productivity** for companies who implement DocuSign's DTM solution.

“By YE 2015, DTM will be a strategic imperative...due to its impact on virtually all aspects of how a firm is measured and evaluated for business success... DocuSign and others are working to establish a new standard for trust and connectivity around digital transaction management.”

— ARAGON RESEARCH, 2014






## Consumer Insight: What Do the Experts Say?

Before launching the DocuSign DTM solution, Salesforce averaged around two days to close a deal. With DocuSign's DTM platform, Salesforce is closing 90 percent of deals in less than a day, with 71 percent closed in less than an hour. Even more impressive, they're closing 60 percent of deals in **less than 15 minutes**.

In addition, Salesforce estimates the DocuSign DTM solution has saved them 322 workdays a year and cut 10 minutes off the time it takes to provide every customer quote. However, for Salesforce's own customers more than 50 percent have said that it takes them more than a week to execute a contract. ([https://www.DocuSign.com/sites/default/files/documents/casestudy\\_salesforce.pdf](https://www.DocuSign.com/sites/default/files/documents/casestudy_salesforce.pdf))

Like many other companies, Salesforce's use of DocuSign goes far beyond eSignatures. DocuSign's DTM platform handles preparation, execution, and management of all aspects of virtually any type of transaction in an all-digital environment:

-  Advanced authentication to validate an identity ensures enterprise-level security to protect confidential company information and is more legally enforceable than pen and paper.
-  Complete information is captured for reporting and accountability.
-  Everything is mobile-enabled, securely encrypted, and legally accepted around the world.

“[DTM] tools have a lot to offer most any organization, but companies must take care to choose the best tool for the job (or jobs) at hand. A recent evaluation by ProgrammableWeb shows that among the...options available today, one stands out clearly from the rest: DocuSign.”

— PROGRAMMABLEWEB, 2014



# Success with DTM



## Social Networking: LinkedIn

DocuSign's DTM solution together with Drawloop offers LinkedIn salespeople a logical workflow, allowing them to close deals quicker.

### Highlight

Streamlined contract workflows to reduce time to invoice from 25 days to 5 days.

"The introduction of DocuSign [provided] ... access to over \$1M in additional working capital on an annualized basis."

— **Brian Frank**, Director of Global Enterprise Operations, LinkedIn



## Agriculture: DuPont Crop Protection

After 150 salespeople at DuPont implemented DocuSign, DuPont saw a 300 percent increase in Salesforce CRM usage overall.

### Highlight

Saved more than 500 work hours in less than 10 months.

"Area managers have credited DocuSign as the most productive tool within DuPont."

— **Tim Kantor**, Data Manager, DuPont Crop Protection



## Internet Service: Comcast Business

The outside sales group is completely mobile with tablets. DocuSign on their tablets closes the loop by allowing the salespeople to go from initiation to close in one meeting.

### Highlight

Increased close rates by 30 percent.

"DocuSign was a tool where I got thank-yous back from the field. I had sales reps writing me notes, 'thank you for giving us DocuSign'."

— **Terry Connell**, SVP, Comcast Business



## Travel: HotelTonight

HotelTonight, a leading hotel booking app, has signed on nearly 100% of its 10,000 partners using DocuSign. "Every time we make a process easier, like with DocuSign, it helps our partners and customers become more interested in working with us," said HotelTonight COO Jared Simon.

### Highlight

Eliminated paper-based contracts with 99.5% of contracts DocuSigned.

"Speed and ease of use are so important for HotelTonight. DocuSign was the perfect partner to bring those same things to the way we work with hotels."

— **Sam Shank**, CEO, HotelTonight



# Value of Integration

One of the most powerful capabilities of the integrated app model is the ability to incorporate multiple complementary apps that work well together into your CRM.

For instance, Salesforce itself integrated several apps that work seamlessly with DocuSign's DTM solution. It's a model that provides a good template for other businesses.

Using a cloud-based integration app called Jitterbit to pull everything together, Salesforce merged the DTM functions of DocuSign with a Configure, Price, and Quote (CPQ) app called Apttus, and a compensation management tool from Xactly. As a result, deals can be managed from start to finish without ever leaving the Salesforce platform.

Yamaha implemented a similar multi-app strategy centered on their unique needs. They integrated DocuSign and Drawloop,

a sophisticated document creation and management tool. Now, they're able to create and deliver up-to-date, accurate, binding contracts from three divisions selling many different products to their international network of dealers and retailers.

According to Yamaha's CRM Manager Mike Machado, this solution saved the company \$10,000 per month in courier charges alone—and cut their closing time from weeks to minutes. By using their existing Salesforce platform, Yamaha was able to implement their solution in just one month with zero additional IT investment.

DocuSign also offers close integration with CPQ solutions CallidusCloud, SteelBrick, and BigMachines, document creation and management tools Drawloop and Conga Composer, and a growing list of other Salesforce apps including Selectica, Zuora, OpenTrust, and more.

## APP INTEGRATION: CASH TO QUOTE TO COMPENSATION

Here's how app integration put all the key tools a salesperson needs to make a sale, from quote to compensation, inside Salesforce.

- 1 JITTERBIT**  
Jitterbit makes it simple to integrate, configure, and test the apps that need to work together—in this case, Apttus, Xactly, and DocuSign.
- 2 APPTUS**  
Apttus puts everything a salesperson needs to make an accurate, optimized quote tailored to each specific customer right inside Salesforce. Quotes can be changed on the fly, and everything is always accurate.
- 3 XACTLY**  
As soon as the quote is put together, Xactly shows the salesperson how much commission they'll generate. Each change to the quote generates a change to the commission, providing real-time incentive.
- 4 APPTUS + DOCUSIGN**  
With a few clicks, Apttus plus DocuSign seamlessly generate an accurate, binding digital contract. As soon as it's read and agreed to by the client, with another few clicks, the deal is done.
- 5 XACTLY**  
As soon as the deal is signed, Xactly automatically adds the commission to the salesperson's monthly compensation.

“DocuSign leads the field with...more than 55,000 paying customers [currently more than 100,000], ranging from individuals to large corporations. DocuSign has invested more than \$100M to date in its solution, which is evident in the depth of features and capabilities, number of integrations, and breadth of customer use cases.”

— FORRESTER, 2013

“Strategic integration of customer data from across different business systems can produce a highly personalized and even predictive marketing and sales approach.”




— CIO.COM



# Digitize the Most Vital Step

In addition to integrating with other Salesforce apps, DocuSign's DTM also works seamlessly with Box, Dropbox, Google Apps, Google Drive, Microsoft Dynamics CRM, Microsoft SkyDrive, NetSuite, SugarCRM, Android, iPhone, and Windows 8.

According to Intellicap, companies that have implemented DocuSign enjoy benefits in three main areas:

-  **Immediate ROI.** By slashing transaction time, organizations usually see financial benefits in weeks vs. months or years. e-Rewards, for instance, increased contracting speed by 500 percent.
-  **Delighted customers.** If your customer wants to close a deal, DTM handles it almost instantly—vs. the long wait times of paper-based transactions—with simplicity and ease. After implementing DocuSign, Comcast increased close rates by 30 percent.
-  **Increased compliance.** Since every DTM transaction leaves a digital audit trail, documenting compliance for laws, regulations, and internal processes is fast, easy, and 100 percent accurate. Using DocuSign, Edgar Online was able to reduce contract signing from weeks to less than 48 hours with no IT investment.

“People want to get the whole job done, or more related jobs done, on a single platform.”

— MIKE BOYSEN, EFFECTIVE CRM

By digitizing the most vital step of the customer relationship—closing the deal—companies can give their customers what they want when they want it.

It's clear that the DocuSign's DTM solution is delivering significant benefits, helping businesses get the most from their CRM investment, and setting a new global standard of trust. If you're looking for the highest possible ROI from your CRM, [DocuSign's DTM solution](#) is a must.

## Future Market: What is the future of CRM?

Today's world is more connected than ever before. CRM platforms have proven to be the most effective tool businesses have to connect with their customers and their employees, providing real-time, mobile access to get things done. But CRM can no longer stand alone, which is why the future of CRM lies in apps like DocuSign, to empower companies of every size and industry to achieve dramatic ROI by going fully digital.

“The forecast from Gartner shows Customer Relationship Management (CRM) increasing to a \$36.5B worldwide market by 2017.”

— FORBES



# Customers Save with DocuSign's DTM Solution

COMCAST  
BUSINESS

Results: Increased close rates by **30 percent**.

  
e-Rewards

Results: Reduced contracting process **from 5 days to an average of 1 day**.

  
EDGAR  
ONLINE

Results: Reduced contract signing from weeks to **less than 48 hours** with no IT investment.

  
ExtraSpace  
Storage

Results: Decreased company-wide paper costs by **90 percent**.

 WYNDHAM  
WORLDWIDE

Results: Contract cycle time reduced by **400 percent**.

 CenturyLink™

Results: Saved **1,700 selling hours** per month.

# Addendum: How Companies Use DocuSign's DTM

With DocuSign's DTM, businesses of all sizes are finding dozens of ways beyond sales to transform their business processes.

In fact, just about any paper-based project, especially with multiple stakeholders, can see a boost in efficiency from DTM.

Here are some of the ways companies currently report using DocuSign's DTM solution to achieve dramatic ROI:

## SALES

- Sales Order Processing
- Account Provisioning
- Sales Compensation Agreements
- Referral Agreements
- Field Sales Agreements
- New Customer Sign-ups
- Terms and Conditions

## HUMAN RESOURCES

- New Hire Paperwork
- Expense Reporting
- On/Off-boarding Checklist
- Employee Policy
- Distribution and Signature
- Contractor Agreements
- Non-disclosure
- PTO Management
- Payroll Forms

## FINANCE

- Invoice Processing
- Expense Reporting
- Capitalization Management
- Audit Sign-off
- Policy Management
- Inventory Sign-off
- Asset Transfer/Retirement
- M&A Documentation

## IT/OPERATIONS

- Asset Tracking
- Change Requests
- Requirements Sign-off
- Access Management
- Incident Reporting
- Production Change Authorization
- Maintenance Authorization
- Order Fulfillment

## LEGAL

- NDA's
- Contract Management
- Internal Compliance
- IP Licensing
- Patent Applications
- Board Minutes
- Trade Name Assignment
- Trademark Assignment
- Finance Agreements

## MARKETING

- Event Registration
- Customer Communication Approvals
- Mass Mailing/Email Approvals
- Brand Compliance/Audits
- Event and Vendor Approvals



## FACILITIES

Front Desk Sign-In  
Work Orders  
Lease Agreements  
Move-In/Move-Out  
Requests  
Parking Permits  
Equipment Rentals  
Lien Releases  
Site Passes and On-Site Waivers

## SUPPORT

Account Changes  
Service/Work Orders  
Term Changes  
Self-service Requests  
Compliance  
Field Service  
Cancellation Requests  
Internal Cancellation Processing

## PRODUCT MANAGEMENT

Change Management  
Release Management  
Code Review Reporting  
Requirements Acceptance  
Release Scope Commitments  
Project Charter Templates

## PROCUREMENT

Purchase Orders  
Statements of Work  
Master Service Agreement  
RFP Sign-off  
Supplier Compliance  
Competitive Procurement Summaries  
Sole-source Justifications  
Procurement Card Applications  
Finance Agreements

# Addendum: For more information

 DocuSign

 Salesforce

 Jitterbit

 Apttus

 Xactly

 CallidusCloud

 Drawloop

 Conga Composer

 BigMachines

 Selectica

 Zuora

 OpenTrust