

5 Ways HelloSign and Salesforce Work Together to Power Growth



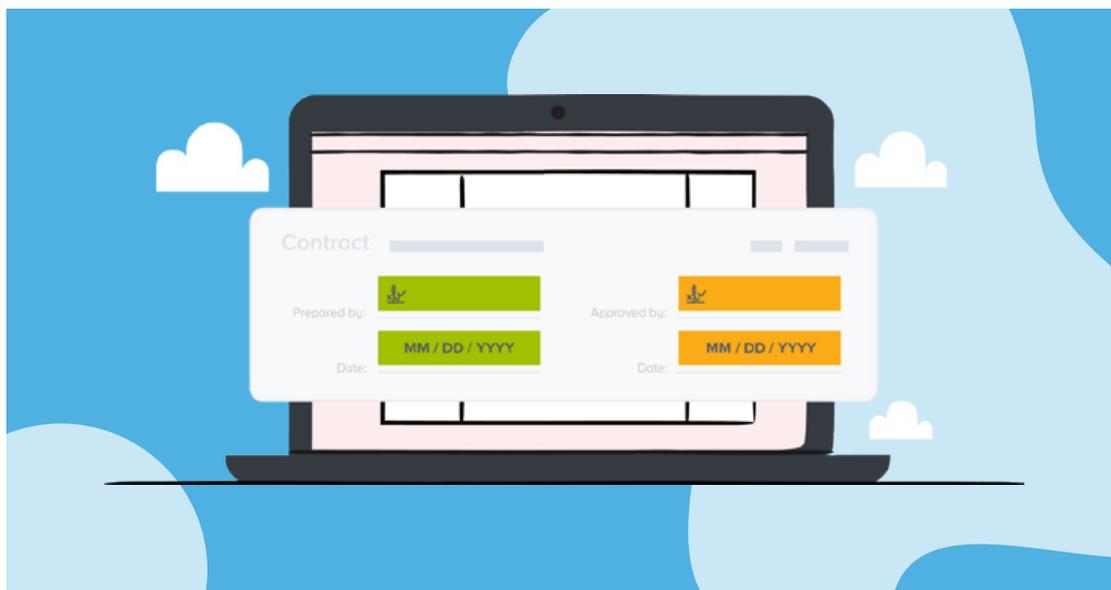
Better Together: The Need to Integrate eSignature and CRM Workflows

The way we work and collaborate has changed. With people dispersed and working across multiple locations, your teams are using new digital tools to stay in sync. The problem is, all this new technology adds complexity as content is scattered, slowing down critical document workflows.

Combine this digital complexity with a handover to physical contract processes and you compound the problem. Paper contracts are a persistent challenge, where it can take five to six days to manage the signing process. Not to mention the cost of printing, postage, associated storage costs and the potential for mistakes to creep in and start the process from scratch.

The good news, however, is that with Salesforce at the center, your organization has a lifeline to remove these hurdles and eliminate the complexity preventing business from operating with speed and with agility. The Salesforce platform drives value across the business and enables sales teams to close more deals and better nurture prospective relationships, customer success teams to better manage customers, and finance,

HR & legal teams to have better oversight into operations for improved critical decision making.



eSignatures like HelloSign bring seamless digital contract workflows into the Salesforce platform, and when integrated, enable you and your employees to:

Have a single view of the customer journey:

Bring contracts and document workflows into a unified platform for a single view of the customer journey

Improve the customer experience:

Introduce a sleek and streamlined contract or document workflow to make it easy to onboard customers

Reduce admin and improve productivity by building automated workflows:

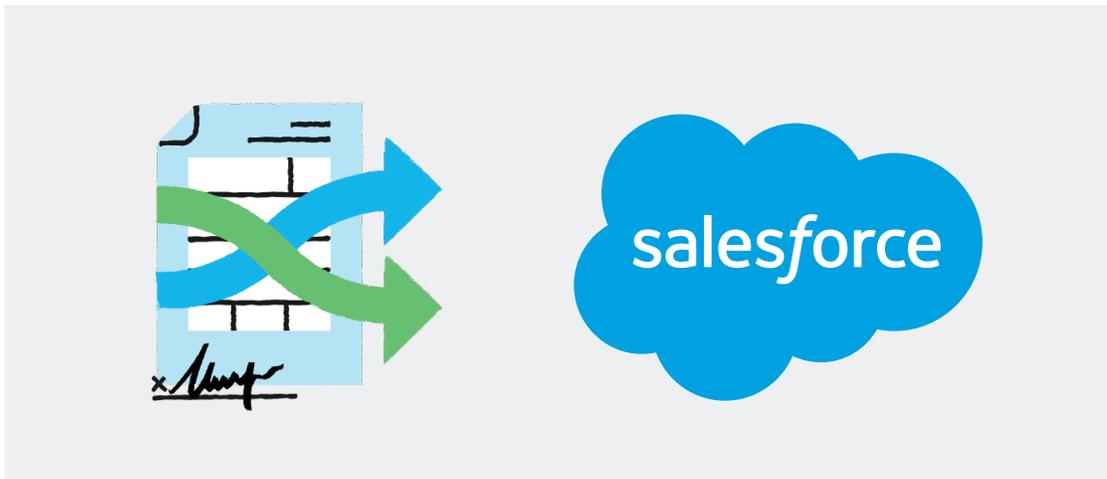
Strip away manual administrative tasks and free teams to work on more value-add tasks

Have legally binding electronic signatures and comprehensive audit trails:

Integrate eSignature technology into your contract process to provide a detailed transaction history of every interaction, amend, and signature, thanks to date and time stamping

Accelerate business growth and scale:

Bring disparate tools together into a single platform to align teams around a single view of the truth and drive growth

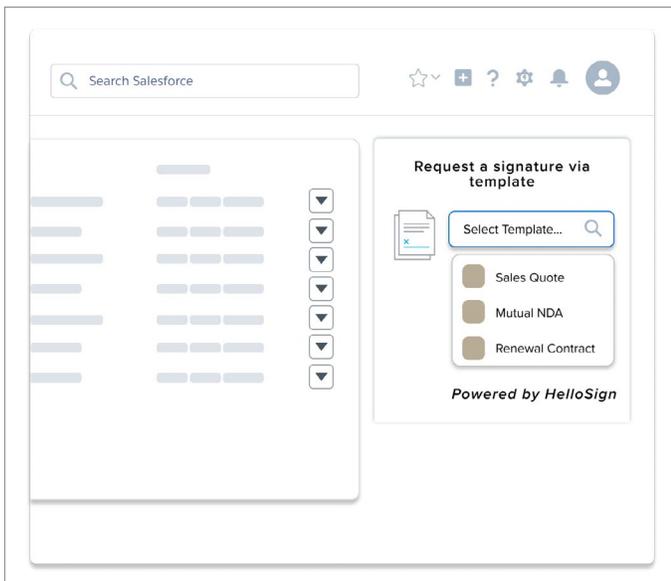


Reason 1

Single customer view

The way you treat your customers is critical for the ongoing success of the business - after all we strive to solve their challenges. And businesses which excel at providing a great experience grow revenues 4-8% faster than the competition, and retain loyal customers.

Using multiple systems distorts the picture and makes it difficult to see a detailed engagement and interaction history needed to deliver great value. Integrating an eSignature solution into your CRM helps you build a more complete picture of your customers and gives you a single place to view their contract history.



Understand your customers better with HelloSign for Salesforce

HelloSign integrates with Salesforce to enable sending contracts for signature and automatically storing them against your contact records in Salesforce.

Now your marketing teams can quickly and easily see signed contracts and identify customers interested in your customer advocacy programs.

Finance teams can check Salesforce records for signed deals since contracts are stored directly against your customer records.

HelloSign and Salesforce come together to build a more comprehensive single view of the customer and empower both operations and HR to plan based on a more realistic view of the business.

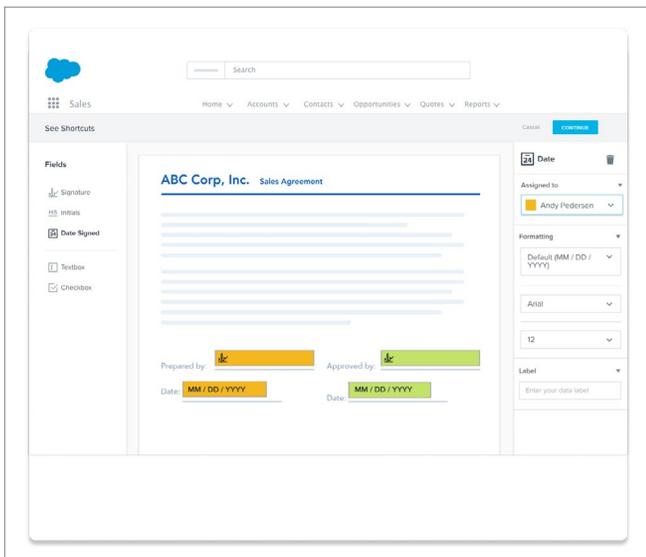
This empowers all stakeholders across the business to not only help and support customers but gain a deeper view of how things are progressing across the business.

Reason 2

Improve the customer experience

As stated in the introduction to the previous chapter, those businesses delivering exceptional customer experiences are growing revenues faster than the competition. And for those who are falling behind, it gets worse, with 8 out of 10 customers saying they would switch to a competitor following poor experiences with a supplier or organization.

Integrating an eSignature solution into your CRM tool makes it easy to create streamlined customer onboarding and document workflows which can improve document turnaround times by as much as 80%.



Streamline your customer journey with HelloSign and Salesforce

HelloSign integrates directly into your Salesforce instance making it possible to create, send, and receive signed contracts in a single click from inside Salesforce. Now your sales teams can spend more time actively selling and less time worrying about contract admin.

With fields auto-populated, assigned signatories, and a branded digital experience, your customers are given a simple way, to sign.

You can now move quicker too since you can bring customers on board in as fast as minutes rather than days - helping you realize revenues faster.

Improve both your customer and business experiences through an integrated platform for managing contracts and document workflows.

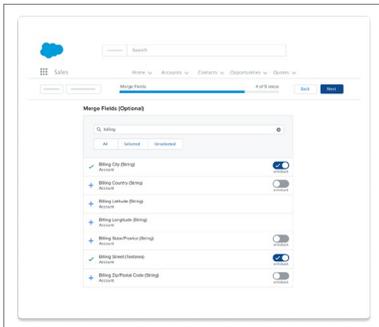
Reason 3

Automate workflows

With so much to think about already - product costs, service agreements, contract negotiations, special terms and renewals - your teams don't need to be bogged down with unnecessary complications. They also don't need to be switching between multiple platforms and applications to complete a document workflow.

Overwhelming your teams with lots of processes distracts them from the job you've employed them to do, and can ultimately lead to errors in the document cycle, slowing you down and costing your business money.

Integrating eSignature technology into Salesforce opens up a world of possibility for automation and streamlined workflows. By automating the process and reducing the number of clicks from start to finish on contracts, you reduce the risk of human error, and teams stay focused on getting contracts signed, rather than endlessly updating Salesforce records.



"Before integrating HelloSign for Salesforce CPQ into the Amenify platform, internal resources would have to manually update contract variables. The combination of Salesforce CPQ and HelloSign automates this process and allows us to get contracts updated and signed two months faster than before. It eliminates manual data entry and risk of errors"

-Everett Lynn, CEO, Amenify

Build automated workflows with HelloSign

HelloSign integrates into your Salesforce instance and allows you to define your typical contract workflows, and then simply add the contract distribution step to that workflow

to completely automate a traditional physical stage. Implementation is simple and it's so intuitive your teams will need minimal training.

Simple and secure configuration to automate workflows while using tools like process builder, flows, or apex, lets your team select a workflow from a dropdown list. This selection triggers the contract distribution automatically, pre-populating fields in the contract, stripping out administrative tasks and keeping your teams focused on more productive activity.

HelloSign allows automated workflows to fire based on any changes to your fields within Salesforce - including your custom objects. So, next time you need a customer reference agreement for marketing, NDA for HR, or an RFP for sales, let your automated workflows within Salesforce send out the contract for signature.

HelloSign integrates seamlessly with the Salesforce platform making it easy to create workflows using tools like process builder, flows, and apex.

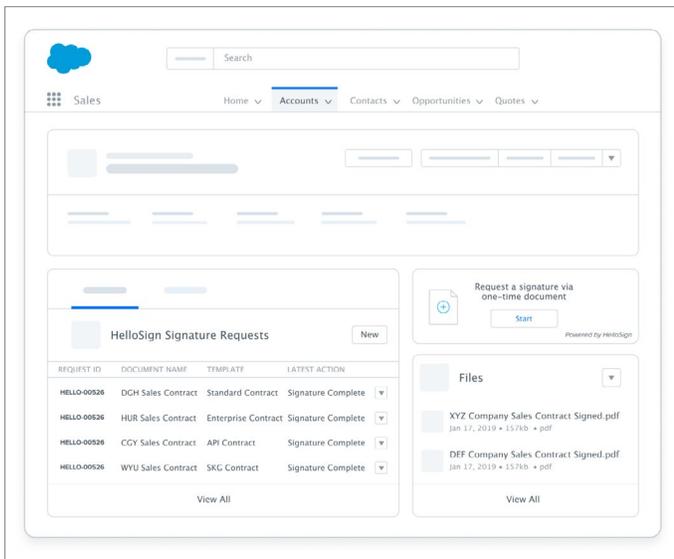
Reason 4

Legally binding eSignatures

Printing and sending contracts for signature to close deals costs money, and when you have a big sales organization, the costs can escalate rapidly. But, perhaps more importantly, physical contract signing processes are difficult to track, manage, and audit—leading to potential challenges down the line, and heavy management overheads.

Integrating eSignature and Salesforce CRM technology digitizes the signature process and provides access to clear, comprehensive audit trails. Now you can see every transaction and interaction with the customer, as well

as time and date stamps for contracts being signed, alongside any contract changes made along the way without having to leave Salesforce.



“It used to take about four weeks to get revenue-generating documents signed and completed. Now using HelloSign for Salesforce CPQ we get signed documents back 33% faster.”

-Everett Lynn, CEO, Amenify

Comprehensive audit trails with HelloSign

HelloSign moves the contract process into the digital realm and makes it easy to manage approvals and signatures from within Salesforce. Electronic signatures are legally binding, and therefore provide an excellent solution to simplify the management and delivery of contracts.

The Salesforce integration with HelloSign provides a copy of the contract inside the customer record, complete with a history of how that contract has been handled. Now your sales and legal teams have a secure and reliable way to manage customer onboarding that mitigates risk.

Every interaction with a HelloSign digital contract leaves a footprint detailing when it was drafted, sent for signature, and updated, with details of who signed and when.

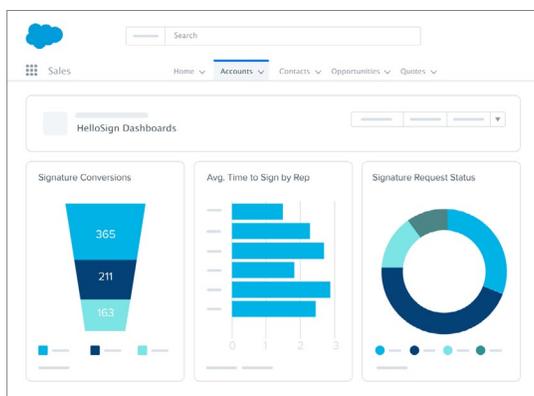
Reason 5

Accelerate business growth and scale

Businesses are looking to new digital tools to drive automation, streamline workflows, and accelerate growth. Critically, however, you need to adopt an integrated approach that empowers all facets of the business while remaining customer-driven in your approach.

With an oversized burden on sales and marketing teams to generate new business, it's important to implement the right environment—technologically and culturally—to empower teams and streamline back office collaboration to keep work flowing.

Integrating eSignature technology with your CRM platform makes cross collaboration easier by bringing in simple tools that teams across the business can easily optimize to get their best work done. Now if your teams are handling large volumes of contracts or operating at pace, you know you have an ecosystem designed to lighten the burden and accelerate your document workflows.



Salesforce and HelloSign drive growth & streamline processes

Working together, Salesforce and HelloSign provide the oversight you need to identify areas for improvement in your organization, turn more opportunities into closed-won customers which fuel your growth.

HelloSign is heavily customizable (without the need for a Systems Integrator or any coding), which makes it easy to add automated workflows, implement contract templates, and accelerate operations from end-to-end to grow with your business and keep up with customer demands.

Automating the contract workflow and integrating eSignature technology into your Salesforce ecosystem helps teams focus on doing more of what they do best and bringing the business closer together. Freedom from administrative tasks—which distract and can be prone to human error—is a great way to invest in your team and the future success of your business.

HelloSign lives inside Salesforce and takes advantage of Salesforce native reporting to provide oversight of contracts out for signature, average time to sign by rep, signature conversions, and any other critical measurements you need to track and monitor to drive growth.

Next steps to accelerate sales, bring teams together and drive business growth

With speed of the essence, a customizable eSignature tool like HelloSign, integrated into Salesforce, gives your business a perfect platform to rapidly accelerate a previously slow element of the contract process.

Bringing these tools together provides a more complete view and deeper insight into your customers and related contracts. The integrated platform simplifies contract and document management, accelerates workflows, shortens sales cycles and gives the wider business what it needs to improve the customer experience and accelerate growth.

If you run a high-volume or low-value sales organization, the automation and freedom from administrative tasks can drive dramatic improvements to your bottom line.

If you run a longer sales-cycle with higher contract value, these streamlined contract workflows can help accelerate turnaround times and eliminate risk from the process and help you realize revenue much faster.

But it isn't just the sales team that experience the benefits of digital contracts. As showcased throughout this book, integrating your CRM with an electronic signature tool like HelloSign helps to improve the customer experience, improve productivity, enhance marketing operations, and accelerate growth.

Automating workflows is a great way to remove human error, reduce costs, and alleviate pressure on your business teams who are often already burdened and working in tense environments against tight deadlines.

HelloSign is proven to accelerate processes, improve document turnaround times, and help businesses realize revenue faster through enhanced contract management. Now is the time to digitize your contract processes and document workflows to work smarter, and faster.



With HelloSign, your team can adopt end-to-end digital workflows that streamline the entire sales process.

Explore
the HelloSign +
Salesforce integration

Talk
to a sales specialist at HelloSign

Book
yourself a demo here