



# HOW WE **AUTOMATED** SALE **CONTRACTS GENERATION** FOR A HIGH-VOLUME CONVERSION ENVIRONMENT

*In this case study, we discuss the journey of a company that had a sales force distributed across multiple locations. It was a high-volume sales environment with 100s of clients signing up on a daily basis.*

## KEY METRIC

The process helped free up a whole team and company resources.



**Elimination of manual interference**

## SUMMARY

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The professional services and legal sector frequently grapple with substantial paperwork demands in their daily operations. One of our clients, a prominent figure in the Tax Resolution and Preparation industry with a nationwide presence and its headquarters in Chicago, USA, sought a comprehensive solution to streamline the automated generation, distribution, signing, and retrieval of their sales contracts. This case study elucidates how Nablasol effectively addressed their needs and facilitated the achievement of their objectives.

## BUSINESS CHALLENGES

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The organization operated with a geographically dispersed sales force, spanning multiple locations, and functioned within a high-volume sales landscape, witnessing a daily influx of hundreds of new clients. Given the diversity of services offered, each contract presented a unique set of documents and language, tailored to the specifics of the offerings.

Their existing contract generation process entailed the following steps:

1. Crafting the contract document by populating it with relevant client particulars, details of services rendered, and attaching necessary forms specific to the services provided.
2. Annotating the document for data fields, initials, and signatures within an eSignature platform before dispatching it to the client.
3. Engaging in client follow-ups and tracking to secure the signed documents.
4. Validating the signed contracts and forwarding them to the relevant departments for further processing.



**25% improvement in on-call sales conversions**



**Better allocation of company resources**



**Elimination of manual interference**

A dedicated sales support team, comprising six Full-Time Employees (FTEs), was tasked with assisting the sales team in executing this labor-intensive process. Given its manual nature, this workflow occasionally resulted in errors during contract generation, which could potentially lead to downstream complications.

Moreover, the time elapsed between the initial sales pitch and contract delivery to the client necessitated persistent client follow-up, occasionally requiring additional sales efforts due to possible changes in client decisions since their last interaction with the salesperson.

## **SOLUTION PROVIDED**

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We conducted a comprehensive examination of the entire contract generation process, gaining a profound understanding of its intricacies and requirements. Our analysis encompassed each stage, including document prerequisites, sequencing, data fields, signature placements, and the post-signing document processing.

Subsequently, we engineered a fully automated solution for the complete contract workflow, structured as follows:

1. Introduction of a Chrome plugin enabling the input of the client's case number, which instantaneously generated a customized contract. This contract dynamically incorporated data retrieved from the CRM and included relevant forms.
2. Integration with DocuSign to facilitate the seamless electronic signing of contracts, offering flexibility in delivery through email or SMS.
3. Upon contract signing, an automated process initiated the document's integration into the CRM, concurrently updating its status to activate the 'contract received' workflow.
4. Furthermore, we implemented an automated extraction mechanism for forms within documents, followed by tagging them for departmental review. When necessary, these forms were also auto-faxed to government agencies for filing.

## IMPACT ON BUSINESS

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The complete automation of the contract generation process yielded significant impacts on the business, including:

- A remarkable 25% increase in sales conversions, as sales personnel could promptly secure contract signatures while on calls with clients, guiding them through the process.
- Liberation of valuable time for sales professionals, previously dedicated to tracking contracts within the sales support department and subsequent client follow-ups.
- Elimination of the sales support department's manual contract generation and filing responsibilities, streamlining operations.
- Mitigation of contract-related errors that could have resulted in costly repercussions down the line.
- A substantial enhancement in process efficiency, translating into cost savings and an improved client experience.