

Astadia Makes the Switch to Drawloop

Challenge

Astadia's challenge did not involve manually creating SOWs or contracts. They were already a power user of Salesforce and had integrated an app for automating document generation. Their challenge was the document generation app itself. It suited their needs, but the backend was challenging for a business user to configure and maintain, especially if they did not know how to code. It also required continued training as many of the steps were not intuitive and users needed a refresher each time they wanted to make changes.

Solution

After being introduced to Drawloop and putting them through a thorough evaluation, Astadia integrated Drawloop's LOOP Document Services as their new document automation service. Two things stood out for Astadia's sales operations team that drove the switch. The first and most impactful was Drawloop's simple drag and drop functionality and easy to use administration interface. The second was Drawloop's support team and their willingness to work with Astadia's needs, going as far as configuring the product to fit them.

Results

For Astadia's sales operations team, Drawloop – both LOOP Document Services and the support team – has significantly made their world easier. Prior to Drawloop, it could take days to load and configure a document and make it "automated." With Drawloop that process has been reduced to minutes if not a minimal amount of hours. For the sales team, they continue to leverage Drawloop's functionality, finding ways to automate documents and processes that they didn't think was possible. Both teams are extremely satisfied and love Drawloop.

Astadia Changes Document Generation Vendors & Saves Valuable Time



When Drawloop was introduced to Astadia, they were already a power user of Salesforce and had even integrated a document generation app. This only made sense given they are a leading global provider of business services and an experienced salesforce.com system integrator.

The issue, however, was that the document generation app, in spite of being one of the most highly adopted, was extremely challenging to work with on the backend. As Leslie Dickinson, Astadia's Global Sales Operations Director, stated, "To make changes, I had to constantly refer

to a book of codes - and I'm no coder. Often I would inevitably contact support, set up a WebEx and give them control just so they could make the changes for me."

In May of 2012, Ms. Dickinson she reached out to Drawloop and put them through an extensive evaluation and demo cycle. It was Drawloop's administration interface that sealed the deal.



Industry:

Technology Services

DDP Use Case:

Contracts, SOWs, MSAs, NDAs,
Custom Cover Pages, T&Cs,
Account Plans,
Legal Agreements,
Key Opportunity Presentations,
Credit Check Requests (Excel)

Company Overview:

Astadia is a global business consulting, marketing and technology services company with locations in North America, Europe, and Asia. Astadia uses creativity and technology to architect and implement meaningful business solutions that provide measurable results for organizations, their employees, and their customers.

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Leslie Dickinson,
Global Sales Operations
Director for Astadia

"The Drawloop backend got my attention," said Ms. Dickinson. "Drawloop's wizard and administration interface is so intuitive. Our existing document generation app had the functionality but not Drawloop's ease of use."

After two weeks of working on the project part-time, Drawloop was integrated with Salesforce and Leslie had her SOWs, MSAs and NDAs fully automated and deployed. The wizard and tabs not only guided her through the process of setting up their document templates, but also made it painless to go back and forth between projects when necessary. "The Drawloop wizard was a lifesaver!" said Leslie. "What used to take me days now only takes minutes."

Identifying Opportunities to Improve Their Document Process

Drawloop and Astadia worked together to integrate some complex requirements.

An example of this was the need to deliver SOWs as a Word document instead of a PDF. Astadia needed the flexibility to modify the content. There were 40 unique templates which required sales people to choose and modify different elements including the:

- cover page
- scope of services being implemented
- technology being used
- country or entity of origin
- signature process
- terms, conditions and fees

Once the sales person makes the appropriate selections, the compiled document is delivered to their desktop within minutes. In addition to SOWs, the Astadia sales team also uses LOOP for account plans, MSAs, NDAs, legal agreements and key opportunity reviews.

Key opportunity reviews, in particular, are a great example of how Astadia has leveraged LOOP Document Services in a unique way. In this case, Astadia uses Drawloop to automatically generate a PowerPoint, which is used by sales executives and directors to review enterprise opportunities in the pipeline.

The latest project Astadia is leveraging LOOP for is to automate the process of credit checks. Leslie has set it up so that relevant data is pulled directly from Salesforce accounts and opportunities and then dropped into an Excel spreadsheet that contains various calculations. "It now only takes a sales director two clicks to request a credit check," said Leslie. "One click to generate the DDP and one click to send it."

We Love Drawloop

Both the sales operations and sales teams have been extremely pleased with Drawloop and working with LOOP Document Services.

For the operations team, what they appreciate the most, in addition to the simple drag and drop interface, is Drawloop's support team.

"Drawloop's support team is second to none," said Leslie. "They respond almost instantly and then work with you for as long as it takes. They not only solve the problems but they also teach you how to solve them yourself. That is extremely valuable."

For Astadia's sales engineers who are ultimately responsible for generating the SOWs, they have seen a substantial increase in productivity. "In the long run, working with Drawloop has saved us a great deal of frustration and work effort," said Leslie. "Making the switch to Drawloop is one of the best decisions we've made."

Astadia continues to work with Drawloop to identify new opportunities to improve productivity and drive efficiencies in their sales organization.



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What is a DDP™?

A Dynamic Document Package (DDP) is the tangible output of LOOP Document Services and the end deliverable sent to anyone at anytime. A DDP is a single packaged asset comprised of one or more different document types - Word, Excel, PowerPoint or PDF - that are dynamically merged with Salesforce data. The set of documents are the same native ones currently used during the sales or service process, except now they reside in Salesforce.

About Drawloop

Drawloop fundamentally changes the way documents are created during the sales and service process by allowing you to dynamically merge any Salesforce data into any combination of document templates (Word, Excel, PPT, PDF, etc), via a Dynamic Document Package (DDP). By creating and managing all of your sales and service documents in Salesforce, you eliminate manual processes, increase accuracy and compliance, while still leveraging existing business logic and workflow rules.



For more information

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