

LinkedIn Reduces Proposal Turnaround Time by 50% and Improves Salesforce Data Compliance with Drawloop

Challenge

In 2009, LinkedIn sales reps were at capacity managing thousands of prospects and corporate customers, while still manually creating quotes and contracts. This process was inefficient, error-prone and more importantly, took their sales reps away from selling and interacting with clients.

Solution

LinkedIn selected Drawloop's LOOP Document Services to replace an existing solution and completely eliminated the process of creating and managing documents manually. LOOP was also an attractive solution because of its pre-built integration with DocuSign and Salesforce. This created a complete end-to-end process that automated the creation of proposals and contracts for sales reps and also allowed them to close deals with an electronic signature.

Results

In just four weeks, LinkedIn reps went from a manual document creation process to an automated one generating hundreds of proposals and contracts dynamically from within Salesforce.

- To date, LinkedIn has gone from 50 to over 1000 users and are now generating thousands of documents each week
- Because contracts and proposals are generated using only Salesforce data, LinkedIn has experienced a significant improvement in data compliance and accuracy favorably impacting overall pipeline visibility and reporting
- New sales hires ramp up more efficiently and are more productive faster because they only have to manage documents within Salesforce vs. manually packaging from a variety of programs

Document Challenges: Growth plus IPO Triggers Need for Automated Processes



Since its inception in 2003, LinkedIn had been on a rapid growth trajectory. By 2009, salespeople in the Corporate Solutions Group were maxed out in their ability to respond to prospect and customer requests. Manually creating quotes and contracts was eating up valuable sales time. In addition, the lack of process and controls created issues with compliance. With an IPO right around the corner, these issues urgently needed addressing.

Brian Frank, Vice President of Global Sales Operations, (then Director of Global Enterprise Operations) had just come over from Ariba and knew the value of automated processes. At the time, the sales team was using a competitive document automation service in support of Salesforce, but the product was complex, documents were left exposed on the desktops of salespeople, and manual signatures had to be collected on contracts.



Industry:

Software & Internet

DDP Use Cases:

Quotes, Contracts,
Cover Letters

Company Overview:

LinkedIn is the world's largest professional network with over 200 million users in over 200 countries. They have a diversified business model with revenues coming from member subscriptions, advertising sales and talent and recruiting solutions. Today over half of their users now come from outside the United States. LinkedIn continues to experience strong double-digit growth.

"With Drawloop, we have automated the entire sales contract process, and most importantly, our customer data is accurate. We have eliminated the challenges and problems associated with exposing contracts on the desktops of staff."

Brian Frank,

Director of Global Enterprise
Operations for LinkedIn

LOOP Completely Automates LinkedIn's Sales Document Process

With LOOP Document Services, LinkedIn immediately eliminated the manual issues associated with creating and managing documents. With a direct integration with Salesforce and DocuSign, now all sales reps had to do was choose the object - contract, proposal or custom object - and the associated Dynamic Document Package (DDP) located on the Salesforce platform and they could generate the most up-to-date documents with the click of a button.

The Drawloop support team worked directly with LinkedIn's sales operations team to set up LOOP and train them on building DDPs. First, they identified all proposals, contracts and other supporting documents used during the sales process to build DDPs. Outside of the standard contact information, LinkedIn required that LOOP also pull data from Salesforce native quotes and product line items into the appropriate DDPs. In addition, the LinkedIn team incorporated business

Because the LinkedIn sales ops team had gone through the entire process of building all of the DDPs in Salesforce, the sales reps literally went from manually collecting, editing and sending documents to clicking a button. Now all they had to do to was click the DDP button in Salesforce, choose the appropriate set of documents and click the "Run" button. It was that simple.

As a result of data being merged directly and only from Salesforce, LinkedIn sales people now turn around proposals and contracts in less than half the time -- accurate and error free. The executive team has confidence in their customer data and reports. Finally, LinkedIn has significantly reduced resources devoted to creating and managing documents.

Because LOOP Document Services has been such a valuable tool for the Corporate Solutions Group, LinkedIn plans to expand into other groups.



logic and rules that were already embedded in Salesforce including:

- Routing rules - DDPs were routed to managers for approval depending on the account type
- Business logic - Because LinkedIn sells worldwide, certain accounts required additional information or documents to be included in a DDP
- Business workflow - Workflow rules were setup based on how the end user wanted to receive the DDP

In addition, LinkedIn also implemented scheduled reporting to distribute standard Salesforce reports. This ensured that reporting was consistent and that everyone in the organization was always up to date with the latest information.

Results

Because of LOOP's intuitive setup wizard and easy point and click administration, LinkedIn was able to go live with all their sales documents in only four weeks. The impact was felt immediately.



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.



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