



CASE STUDY

# Projectplace Improves Project Management with DocuSign for Salesforce

## Summary

- Improved efficiency of contract and order form execution across the sales organisation by integrating with Salesforce.com
- Faster turnaround, saving up to 4 hours per sales executive per week
- Documents completed legally, error-free and in minutes

Projectplace is Europe's leading provider of project collaboration tools in the cloud. The service is available in more than 160 countries, helping more than 900,000 professionals to improve project collaboration and communication in seven languages. The company is at the forefront of online development, allowing people to collaborate and manage single or multiple projects simply and efficiently, including planning, file sharing and communication. With DocuSign, Projectplace improved efficiency and accelerated turnaround time.

## Challenge

Headquartered in Sweden, Projectplace accommodates all project sizes, from major EU ventures to small event projects. The company sought a solution that would allow it to manage and monitor the signing process with great precision for its customers and throughout the organisation.

Mia Ingelström, Head of Business Operations for Projectplace said, "Whilst we had made lots of improvements to our processes within Salesforce, we also wanted better control over the signing process". Because all signed documents, from contracts to order forms, are required to be completed within Salesforce, the company necessitated a platform that could integrate with its CRM.

## Solution

Projectplace often co-exists with other systems. A wide array of integration options is available to its customers so it was looking for an eSignature solution that had consummate integration capabilities within Salesforce.



"DocuSign is very much aligned with the philosophy of Projectplace – to constantly improve the way we work and enable our staff to focus on what is important. We are more efficient now, both internally and externally."

Mia Ingelström  
Head of Business Operations, Projectplace

As a result of DocuSign's open APIs, Projectplace sought to benefit from the incomparable integration that DocuSign has directly into Salesforce.

## Results

With DocuSign for Salesforce, Projectplace has achieved fast results. Since implementing the solution eleven months ago, they have found that DocuSign significantly reduces the time spent by employees handling and tracking documents. According to Ingelström, "On average our account executives are saving one and-a-half hours per week – some as many as 4 hours per week with DocuSign."

Now, when a salesperson moves a Salesforce Opportunity to Verbal Close, it begins the contract process. Using DocuSign means that the Opportunity is sent for approval to the Sales Director at Projectplace and at the click of a button the contract is sent for the customer's signature via DocuSign. Once the customer has DocuSigned the document, Salesforce is updated. "From an administrative point of view, we value the ability to have everything structured in Salesforce", says Ingelström.

The organisation received particularly good feedback from customers within Sweden, Norway and Denmark, where acceptance is high.



Additionally, the sales staff cited DocuSign as “highly valuable” to their sales contracts, as they can complete and sign documents legally, error-free and in minutes. They can always rely on the right order forms being used.

“We have already seen a significant number of benefits in using DocuSign such as our contract process, which now works the way we always envisioned. We believe that the key is to streamline the process as well as to enable our staff with training, which is something we continuously do”, Ingelström added.

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The Global Standard for  
Digital Transaction Management™

#### About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management™. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

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