



SpringCM Customer Success

SENTINEL HEALTH GROUP



BENEFITS

- **Reduced sales cycle by 75%** using Request for Electronic Signature
- **Account executives have saved 1 hour per contract** — time once spent searching for information
- On-demand contract management available any time, anywhere empowers account executives to better service customer needs.

IMPLEMENTATION HIGHLIGHTS

- **SpringCM's on-demand solution is pre-integrated with salesforce.com**, helping Sentinel get up-and-running in a day
- Request for Electronic Signature means **clients can "e-sign" contracts without a SpringCM or salesforce.com account**
- The familiar interface helped ease user adoption
- Templates and contract clauses stored in SpringCM expedite the creation of new contracts based upon best practices

Sentinel Health Group Closes Deals Faster with SpringCM's Contract Accelerator for Salesforce.com



Sentinel Health Group, a Colorado-based medical staffing agency, connects doctors with hospitals in need of short- and long-term personnel assistance. To facilitate staffing needs, account executives from Sentinel coordinate contracts between the doctors and hospitals, which, until recently, was a drawn-out and cumbersome process.

Jonathan Charles, senior account executive for Sentinel, joined the burgeoning staffing agency and soon discovered that his employer's biggest challenge wasn't dealing with too few doctors or overstaffed hospitals. Instead, the lack of a contract management system prevented Sentinel from closing deals quickly and winning more business. "Nobody stored their templates in one place," Charles said. "We wasted hours searching for templates that didn't contain standardized language and required major revisions for each new opportunity."

Aside from searching for a contract template to initiate the contract creation process, Charles and other account executives had trouble locating contracts to reference something as simple as a start date. "It took me about an hour to find a contract because they weren't organized by start date, the doctor's name, hospital or any useful criteria," Charles added. "If I had to find eight contracts in one week, it meant wasting an entire workday just looking for information."

After account executives mailed or faxed completed contracts to the appropriate doctors and hospitals, the wait began. Doctors couldn't start working until Sentinel received signed contracts from each party. Unopened mail and unchecked fax machines delayed doctors from helping patients.

Because all contracts and templates were stored in various computers or offices, working remotely became impossible, a major impediment for on-the-go account executives.

Effectively Creating, Delivering and Managing Contracts

Charles' first act of business was selecting salesforce.com to organize Sentinel's database of client and opportunity information. Next, Charles scoured the Salesforce.com AppExchange for a contract management solution that could extract start dates, doctors' names, hospitals and other key data stored in salesforce.com and insert that data into a contract. That's when he found

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With content management and CRM integration, account executives are now able to complete their work and close sales twice as fast. When account executives are ready to create contracts, they perform a simple mail merge that generates contracts containing the key information stored in salesforce.com.

The newly generated contracts are then delivered via Request for Electronic Signature, a SpringCM feature that allows account executives to send links to PDF versions of contracts to doctors' and hospital representatives' e-mail inboxes. The doctors and representatives review the contracts and "e-sign" the PDFs directly within their Web browsers.

Electronically signed contracts are automatically routed to SpringCM and saved as the latest versions of the contracts. When account executives view opportunities in salesforce.com, the signed contracts—and any other documents related to the opportunity—are available in the same screen, eliminating the hassle (and confusion) of switching between two Web-hosted applications.

Cutting Time, Saving Resources and Increasing ROI

SpringCM has provided Sentinel with a completely Web-based contract management solution that uses one secure, central repository to store all content. Charles and his fellow account executives can access templates, signed contracts and any other sales-related content from anywhere they have an Internet connection, a major benefit while travelling or working remotely.

Approved contract templates are stored in a Template Library, enabling instant access to approved templates all tailored for specific scenarios. SpringCM's version control capabilities restrict account executives from accidentally uploading an outdated or incorrect template. According to Charles, hours of searching has been reduced to seconds.

In addition to saving account executives from the monotony of manually entering opportunity data into contracts, the salesforce.com mail merge has eliminated the chance for human error when generating contracts. Likewise, the Request for Electronic Signature feature frees account executives from another manual process, and, more importantly, places contracts in the hands of doctors and hospital representatives sooner.

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With SpringCM's Contract Accelerator for Salesforce.com, time spent searching for contracts, reviewing contracts for accuracy and waiting for signed contracts has been reduced by over 75 percent. The mixture of Web-based contract management and CRM has produced an immediate ROI.

"We've found an affordable way to increase customer satisfaction and decrease the time it takes to close business," Charles said. "To me, that's invaluable."



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