

Obsidian HR automates their quote to cash process with Formstack document automation

The Client

Obsidian HR is a full service Professional Employer Organization (PEO) based in Denver, Colorado. We help you hire, retain, and manage people day-to-day so you can stay focused on effectively managing, developing, and growing your business. We provide human resources, employee benefits, payroll and risk & compliance management services on an outsourced basis to small to midsize businesses.

The Problem

The Obsidian sales team was looking for a better way to produce the documents they needed to close new deals. Their process was to create the contract in a word document that contained upwards of 25 pages and manually fill out all of the necessary information. Not only did this take selling time away from the sales reps, but it also opened them up to errors that might slip through the cracks.

On top of that, after the document had been created by a sales rep, the information still needed to find its way into Salesforce. This meant that the sales team had to enter all of the information into two different formats and there was still a possibility of inputting incorrect data or forgetting to fill something out.

The Solution

Using the complete Formstack for Salesforce package (Forms, Documents and Sign), what started out as a solution for document creation quickly became a welcomed process overhaul.

Using Salesforce to house the data, the Aptitude 8 team was able to leverage Formstack Forms so the sales team could easily fill out the information necessary to create a document. This guided form capture became a crucial part of the process because it strictly enforced what data is needed to complete the contract. To accomplish this, Aptitude 8 included nested fields that would capture specific information based on deal types. Once the form collected all of the necessary information, that data would be automatically pushed into Salesforce by leveraging the Formstack/Salesforce native integration.

Once the data was in Salesforce, the sales team would click one simple “Merge Document” button, get a preview and send it out for signature using Formstack Sign.

The Outcome

What once used to be a laborious process has been transformed into one of ease. The Aptitude 8 team was able to both solve a big data problem and instead create data continuity for their leadership team.

Not only does this new process free up precious selling time, but it also creates greater visibility into forecasting, reliable reporting, interactions from the signing party, tracked contract signature status and a better customer experience.

Why Aptitude 8?

The Aptitude 8 team possessed not only deep Salesforce expertise, but also the lean and agile project governance mindset needed to produce a clean, efficient, and user-friendly solution for Obsidian.