



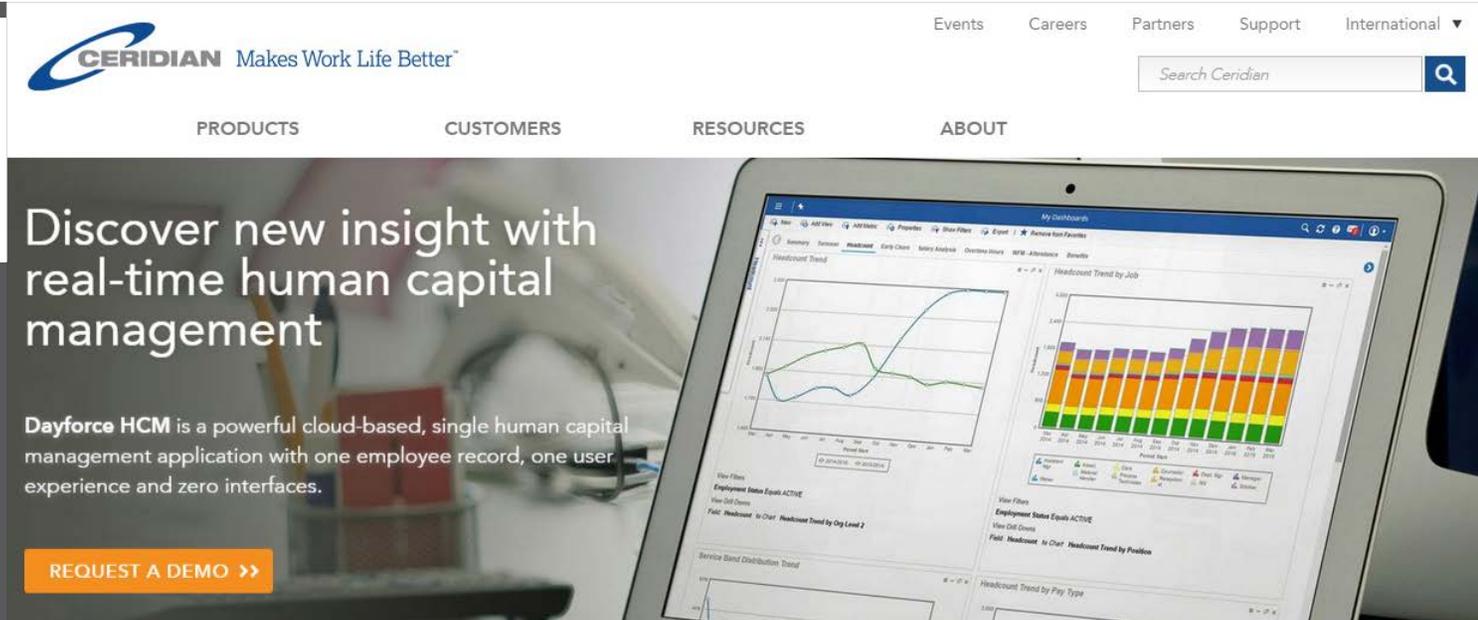
Ceridian transforms sales experiences.

Top human capital management company uses an electronic workflow built around Salesforce, Apttus, and Adobe.



“With Apttus and Adobe Sign, we can develop faster and smoother sales cycles that boost staff productivity by reducing administrative work and errors.”

Amy Roy, Vice President of Sales Operations, Ceridian



SOLUTION

Adobe Document Cloud
· Adobe Sign

Apttus Quote to Cash
Salesforce CRM

RESULTS

80%
LESS TIME

FAST TURNAROUND

Decreased the overall sales quoting cycle time by as much as 80%

40%
GROWTH

HIGH PRODUCTIVITY

Grew the number of sales proposals processed by 40% while improving cost margins by up to 15%



SEAMLESS WORKFLOW

Managed customers from opportunity to contract using a single integrated workflow with Adobe, Apttus, and Salesforce platforms



CONTROLLING RISK

Provided greater visibility and standardization to reduce errors, gained insight into workloads

Ceridian HCM, Inc.

Award-Winning HCM Technology

Employees: 5,000

Minneapolis, Minnesota

www.ceridian.com

CHALLENGES

- Standardize on an end-to-end customer management tool to better understand sales effectiveness across North America
- Centralize customer information for sales representatives to effectively manage accounts during sales cycles
- Improve the customer experience through faster response and uninterrupted flow of information

“By integrating Apttus with Adobe Sign we can manage customers, create contracts, and send them for signature from a single interface, making it much easier to provide a seamless customer journey.”

Amy Roy, Vice President of Sales Operations, Ceridian

Transforming human capital management

Ceridian is a global human capital management technology company with award-winning products including cloud-based Dayforce HCM, Dayforce Global Solutions, Small Business Payroll, and LifeWorks Employee Assistance and Wellness programs. With a wide range of solutions that help companies improve HR effectiveness and efficiency, Ceridian became increasingly interested in how it could demonstrate similar efficiencies through its customer sales interactions.

“We were using different systems to manage the sales processes for Ceridian U.S. and Ceridian Canada, which limited our ability to share intelligence,” says Amy Roy, Vice President of Sales Operations at Ceridian. “Ceridian U.S. also had separate platforms for pipeline management, pricing, and contracts, which meant that sales representatives constantly needed to switch between tools.”

Working with multiple management solutions made it difficult for sales leaders to understand where customers were in the sales process. This information can be vital to helping sales leaders forecast business and develop sales strategies that help representatives connect with customers. Without a central location to store sales information, for example, Ceridian sales representatives had limited insight into a customer’s history.

“From the customer’s point of view, everyone in our organization represents Ceridian, so they expect to pick up the conversation where they left off,” says Roy. “We wanted to provide uninterrupted service to ensure great customer experiences.”

Standardizing on Apttus and Adobe to accelerate sales

Ceridian carefully evaluated several solutions before deciding to standardize contract management on Apttus. Built on the Salesforce CRM platform, Apttus enables staff to quote prices and manage sales contracts, all from within the Salesforce interface. To get the most out of the Apttus deployment, Ceridian looked to Adobe Sign, an Adobe Document Cloud solution, for electronic signatures.

“By integrating Apttus with Adobe Sign we can manage customers, create contracts, and send final contracts for signature without ever leaving Salesforce, making it much easier to provide a seamless customer journey,” says Roy. “We knew we wanted to work within the Salesforce platform, and integration with Adobe Sign was simple. Adobe provided the e-signing piece that tied the contracting process together in an end-to-end electronic workflow.”

“Our previous manual processes involved a lot of scanning and emailing documents for signatures, reviews, and approvals. Sales representatives now use automated workflows to draft and manage quotes and contracts directly through Salesforce using Adobe Sign.”

Amy Roy, Vice President of Sales Operations, Ceridian

Greater visibility into the sales pipeline further accelerates sales. The sales leadership team uses document tracking in Adobe Sign to follow a deal as it happens. Insight into the number and status of current contracts enables Ceridian to better predict workloads and schedules further down the pipeline. Sales leaders can also take steps to improve the sales workflow, using the greater visibility to determine the how changes are affecting sales and processes.

Managing customers and contracts in a unified workflow

Through Salesforce, Apttus, and Adobe Sign, Ceridian has created automated workflows that allow staff to smoothly nurture an opportunity into a signed contract from a single interface. To date, the organization has executed nearly 20,000 primary quotes, processed more than 15,000 approvals, and handled more than 6,000 signatures.

“Our previous manual processes involved a lot of scanning and emailing documents for signatures, reviews, and approvals,” says Roy. “Sales representatives now use automated workflows to draft and manage quotes and contracts directly through Salesforce using Adobe Sign.” Ceridian sales representatives spend less time switching between multiple tools, drafting contracts, and waiting for returned signatures. As a result, the overall quoting cycle time decreased by as much as 80%.

Once a customer relationship has warmed to the point where the customer is ready to purchase Ceridian products or services, the sales representative creates a quote by clicking a single button. Built-in workflows guide representatives through the steps needed for approvals for discounting or custom pricing. These workflows help representatives automatically engage the relevant teams and approvers every time, reducing stress and errors. New hires can also learn to manage processes much faster and with less training thanks to workflows guiding their way.

After an agreement has been reached, the sales representative can create a contract with just a few clicks. The contract workflow automatically initiates the electronic signature process through Adobe Sign. With Adobe Sign, the representative can check document status at any point and receives notification once the contract is signed. Using the integration between Adobe Sign and Salesforce, the signed contract is automatically attached to the customer file in the Salesforce CRM. With just a few more clicks, the sales representative changes the opportunity status and triggers a final review of the contact from the order management team.

SOLUTION AT A GLANCE

- Adobe Document Cloud
 - Adobe Sign
- Apttus Quote to Cash
- Salesforce CRM

Lower risk with increased control over contracts

While the integration with Apttus made Adobe Sign an obvious choice, the legal department also saw the Adobe e-signature solution as a way to reduce risk. Contracts can be generated using standard templates with information pulled directly from the Salesforce CRM, eliminating errors caused by representatives working with outdated contracts or pricing spreadsheets. By standardizing on a PDF template, Ceridian reduces the chance for contracts to include unapproved amendments. For example, any discounts automatically initiate a contract review and approval process.

Serving more customers better

Sales representatives complete contracts and move on to the next client faster. As a result, Ceridian increased the number of proposals processed by 40% without increasing staffing, which helped improve cost margins by up to 15%.

“With Apttus and Adobe Sign, we can develop faster and smoother sales cycles that boost staff productivity by reducing administrative work and errors,” says Roy. “Sales representatives can spend more time working with new clients, developing ongoing and in-depth conversations that nurture relationships and increase our base of loyal customers.”

For more information

www.adobe.com/go/dc-enterprise



Adobe Systems Incorporated
345 Park Avenue
San Jose, CA 95110-2704
USA
www.adobe.com