

Integrated sales: unlocking speed and productivity for growing businesses

Why you need sales integrations and how eSignatures can help
automate your sales cycle



Manual sales tasks are killing your growth

For salespeople, any time not spent on business development is time wasted.

Yet, many small businesses accept isolated tools and manual steps in the sales process, like copying and pasting contact details between applications or downloading contracts and uploading them into other systems.

These manual steps are a big reason why salespeople spend 10.5 hours per week on administrative tasks and only 27% of their time on the job actually selling.

So how can growing businesses unburden themselves from sales admin traps and stay focused on the needle-moving aspects of sales?

We've learned in our recent Dropbox-commissioned research of businesses with 2-999 employees that the answer is rather counter-intuitive: sales teams are winning by integrating their sales tools.

Winning companies are 1.4 times more likely to deploy sales technology tools and 1.9 times more likely to fully integrate them.

That is, by putting in place integrated workflows that minimize manual grunt work in the sales process, salespeople are doing more of what they do best—prospecting, pitching, and closing.

But knowing where to start, what to integrate, and how to make it happen trips many growing businesses up. It's why we've distilled our research to identify:

- How sales processes become disconnected in the first place
- How businesses at each stage of growth tackle workflow bottlenecks
- How to build a robust integrated sales cycle that will grow with your business

10.5

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Why don't growing businesses integrate their sales tech?

An integrated sales cycle sounds great, right? So why don't more companies do it? From our research, two clear reasons emerged:

“I'm too busy to think beyond right now”

Trying to innovate while keeping a business running can feel like an impossible task. By the time you've put out all the fires and taken care of the day-to-day, there's little time to think about how things might be better.

However, when you can get the right balance of immediate and long-term decision-making, it often takes some of the immediate problems off your plate.

While addressing immediate problems is natural, taking a longer view can result in addressing the root cause of a problem and eliminating those tasks entirely.

Take the immediate task of following up on a contract you sent to a prospect last week. Yes, sending a follow-up email is an immediate fix, but implementing a tool that tracks the status of documents and automatically sends follow-up emails will take the task off your plate forever.

“Integration? That sounds difficult”

Most people don't start businesses or pursue a sales career because they love tech.

So while any job today requires a certain level of on-the-tools tech proficiency, it's probably not what spins your wheels.

Perhaps that makes the thought of dropping money on technology you don't fully understand and don't have the time to learn about extra daunting.

Or maybe you already have the technology but connecting it all sounds complicated—so it's easier to keep using your email, eSignature tool, or CRM, in isolation.

The best way to get a good result out of any technology investment is to have a concrete understanding of the end result—what problem is this technology fixing or what process is it improving?

How your business peers think about sales integrations

As sales teams grow, so do the complexities and challenges that come with selling. By digging into how other businesses are shifting their people, processes, and technology at different stages of growth, you can better understand the actions to take in your business that will make a difference now and set you up to avoid future complexity. It's why we launched our Dropbox-commissioned research of businesses between 2-999 employees to find out how growing businesses are approaching their sales workflows.



2–24 employees

People

You're a business owner or one-person sales team that's highly hands-on in deals and contract creation.

Process

As a business owner, you review and often prepare sales contracts yourself.

You're often focused on the short-term with more than one job on your plate and lack the time to establish new processes. That means you're repurposing older documents and working off of more informal templating.

Throughout your workflows, you're repetitiously completing multiple manual steps every time there's a new prospect.

Technology

If you are using a CRM, it's probably a free one. Otherwise, you're relying on email to track your address book and conversation threads, negotiate deals, and send sales contracts to close deals.

When it comes to storage, you're using more informal storage systems or saving files on one computer, as fewer people need access.

How to think about integrations at this growth stage

As a small or one-person sales team, sales is rarely the only job on your plate. Time and technology are your immediate barriers to more and faster sales. To help, you should be looking to productivity integrations that can help you get sales tasks off your plate faster. These might include integrations between your eSignature tools and email or document. But, if you intend to scale, you should also be taking the long view by asking, "Will these integrations still be useful when I have 2, 5, or 10 salespeople, or will I need a new process or technology?"



25–249 employees

People

You're on your way to building a sales team with 2-10 reps or account people. This is where you begin to focus on sales workflows that scale without adding more employees.

Process

As you grow, you have more layers of reviews, approvals, and signers—both internal and external—which adds greater changes and editing demands.

CEO and founder input in the signer process becomes inefficient and often reps are given more autonomy to make deals.

You'll have a few standard document templates saved with formal or informal fields to fill in to speed up the sales process.

Technology

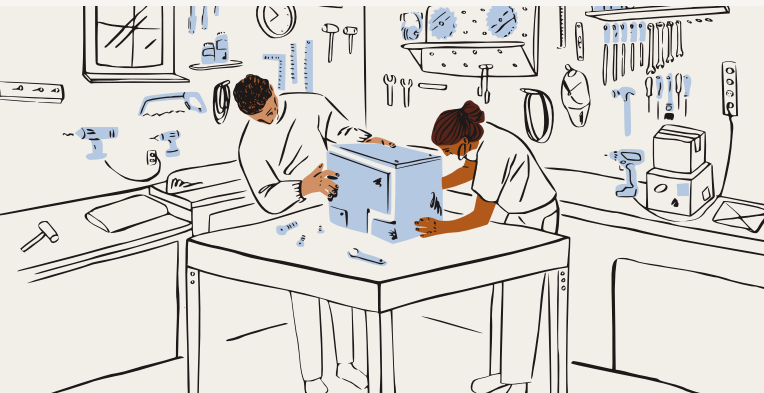
You've implemented a structured CRM that centralizes contact info and records customer interactions.

Though you're often still seeking a higher degree of tracking on prospect and customer statuses and experience a need for shared access to signed contracts.

Along with more customer data comes a demand for increased security and fraud-prevention measures, like audit trails.

How to think about integrations at this growth stage

Once you build a team of salespeople, technology becomes much more important to your sales success—how can you maintain visibility over salespeople's actions while giving them the autonomy to act fast on deals? With a CRM already in place, you can speed up processes like approvals, contract tracking, revisions, and deal info by integrating all of your sales tools into your CRM—that way, you have a centralized hub of deal visibility and your salespeople have all their tools and information in one place. Think email communications, document storage, document templates, and eSignature tools all integrated with your CRM.



250–999 employees

People

You've established a sales team, and more than likely a head of sales who manages regional sales reps or has teams reporting to them.

Process

Your sales process includes multiple revisions back-and-forth from internal stakeholders, lawyers, prospects, and third parties.

For efficiency, you've created formalized processes and contract templates that remove admin and speed the sales cycle up.

You might have a sales process, but it involves manual inefficiencies.

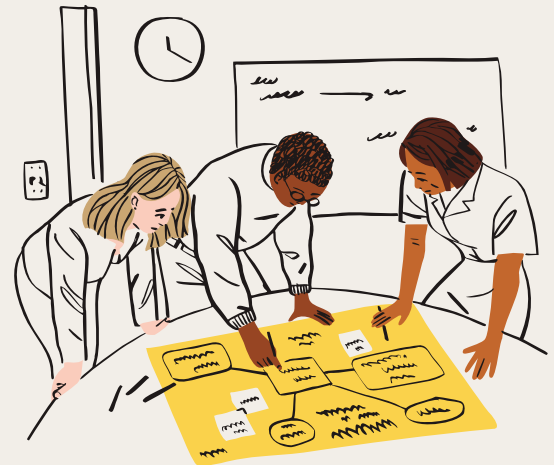
Technology

You have a broader tech stack that includes CRM, project management tools, shared storage drives, eSignatures, and more, and are actively looking for integrations to improve the efficiency and transparency of your sales cycle.

As you expand, you want your CRM to manage multiple teams in different geographies, which requires tighter controls for different contract types, seeing different information, and disallowing individual users from making template changes.

How to think about integrations at this growth stage

At this stage and size, integrated sales tools are table stakes. With so many salespeople entering the equation, visibility and collaboration becomes critical to keeping the sales cycle from stalling—which demands more powerful and integrated technology. Your focus becomes weeding out the inefficiencies in your sales process to ensure reps can spend the maximum time selling, not on approval and admin. That means investing in tools and integrations like sales contract templates that are auto-filled with customer information via CRM integration.



The multiplying value of an integrated sales cycle

Integrations are productivity multipliers for the sales process. When you can eliminate the time solo sellers or sales teams spend on unnecessary manual tasks in a way that applies to every current and future salesperson, you've created a process that scales with your business and sets every one of your salespeople up for success.

Here are some of the common integrations boosting sales teams' productivity.



? Help desk integrations

These integrations can feed contextual customer information back into your CRM, like interaction or purchase history, segmentation details, customer value, complaints, and tickets when you're handling support tickets.

eSignature integrations

eSignature integrations let salespeople create, template, and send agreements for signature directly from their CRM or word processor without switching windows or tools.



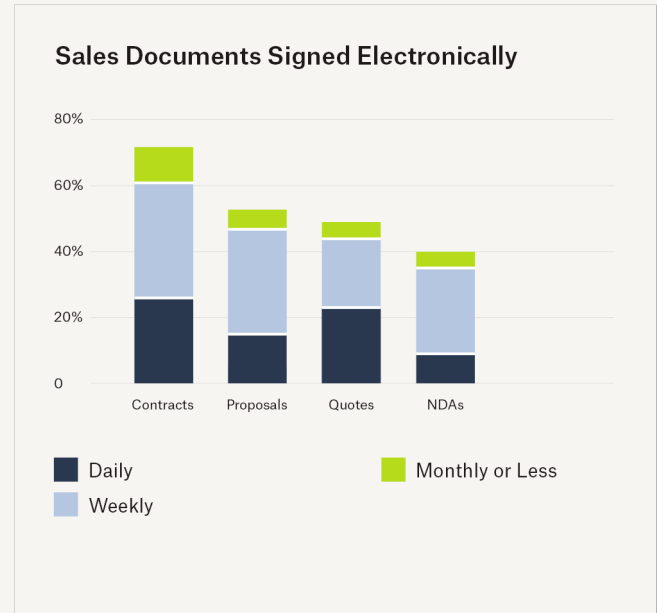
Business intelligence integrations

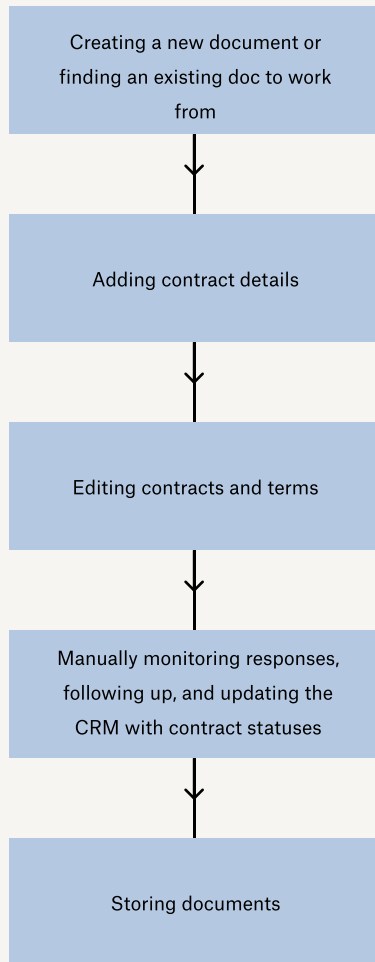
These integrations can help you to visualize your sales data, build forecasts, track CRM activity, spot macro sales behaviors, and even predict chances of churn. While CRMs come with built-in analytics, reports, and dashboards, business intelligence integrations give you a more powerful, dedicated intelligence platform.

Deep dive: The productivity benefits of eSignature integration in the sales cycle

Signing is a massive part of sales, with 71% of sales contracts, 53% of proposals, 50% of quotes, and 40% of NDAs signed electronically by growing businesses.

But just because you're using eSignatures doesn't mean you've got a streamlined signing process. Even in the typical eSignature workflow, there are still several friction points that can grind sales to a halt.





Creating a new document or finding an existing doc to work from

Whether it's because you don't have formalized templates and are working off similar past projects or because you want to ensure all team members use the same approved templates and forms.

Time: 5 minutes per contract

Adding contract details

Manually adding prospect info to contracts—often copying and pasting—is not only a waste of time but can introduce errors.

Time: 5 minutes per contract

Editing contracts and terms

If you're going back and forth on revisions, constantly uploading and downloading agreements into your eSignature can add a lot of manual effort, especially if you have to convert docs between file types (from word processor to PDF, etc.).

Time: 20 minutes per contract

Manually monitoring responses, following up, and updating the CRM with contract statuses

Playing the waiting game with prospects and following up with emails chews up more sales time than you'd think.

Time: 10 minutes per contract

Storing documents

If contracts are sent back and forth within your eSignature tool, filing them—in cloud storage or physically—requires manual uploads and downloads or printing.

Time: 4 minutes per contract




All of these manual interventions in the sales process take up around **44 minutes per sales contract!**


It might not seem like a lot for a one-off, but even if salespeople are only sending one document for signature daily, that's still 267 hours (6.7 working weeks) of non-selling time per year. What more productive sales tasks could get done in 44 minutes every day?


But here's the kicker. Every single manual interaction listed above can be eliminated with eSignature integrations.


The power of HelloSign eSignature integrations

With a simple integration, like eSignatures, you can start seeing real benefits from sales automation and productivity in a snap. Here's what eSignature can do.

 **Avoid going into your eSignature platform at all**
eSignature integrations like HelloSign let you template and send documents for signature directly from the tools you already use—whether that's a word processor like Google Docs or Microsoft Word or a CRM like Salesforce or HubSpot.

 **Auto-fill data from your CRM into your contracts**
HelloSign integrates with most major CRMs so you can automatically fill in contract templates with your CRM data, saving you time and reducing the chances of errors in your contracts.

 **Automatically follow up on unsigned contracts**
HelloSign tracks the status—opened, signed, rejected—for every sent contract. And if a contract goes unsigned, HelloSign sends automatic reminders, so you can focus on selling.

 **Automatically save signed documents into your preferred storage**
Storing important documents always takes longer than you think. To help, HelloSign integrates with major storage tools—Dropbox, Google Drive, Microsoft SharePoint—to automatically save contracts in your preferred location once they're signed.

CUSTOMER STORY



Amenify closes sales 33% faster using HelloSign for Salesforce

Amenify needed eSignature software that could integrate into Salesforce CPQ and allow them to create, edit, and delete contract templates without having to leave Salesforce or toggle between multiple software solutions.

The HelloSign for Salesforce CPQ integration added reporting capability that allowed Amenify to see closed-won status much more clearly, as they have visibility into the number of documents that are awaiting signature.

"It used to take about four weeks to get revenue-generating documents signed and completed. Using HelloSign for Salesforce CPQ, we get signed documents back 33% faster," says Everett Lynn, CEO at Amenify.

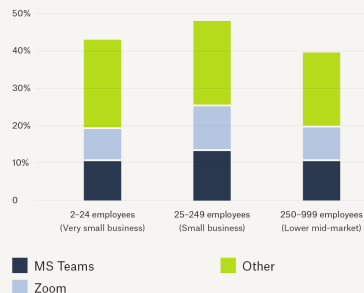


Where sales teams are integrating eSignatures

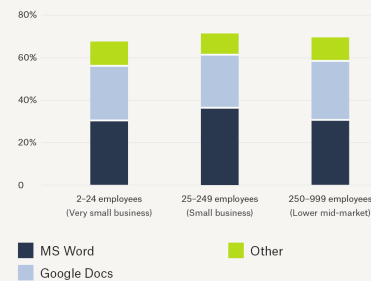
For any integration to be truly effective, it needs to integrate into the trusted tools you already use. From our research, we've identified the common tools businesses of different sizes use—all of which can be integrated to speed up sales workflows.

The most common apps businesses use

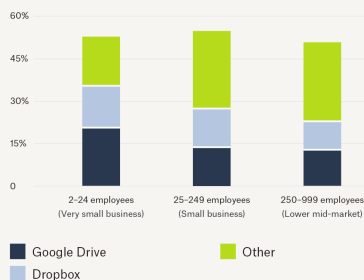
The most common chat/video apps businesses use



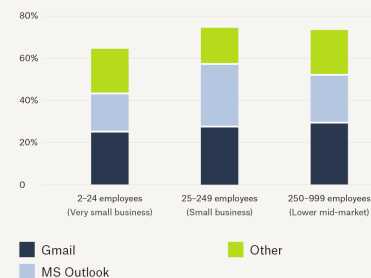
The most common document apps businesses use



The most common cloud storage apps businesses use



The most common email apps businesses use



CUSTOMER STORY



Vivial integrates eSignature 2X faster with HelloSign for Salesforce

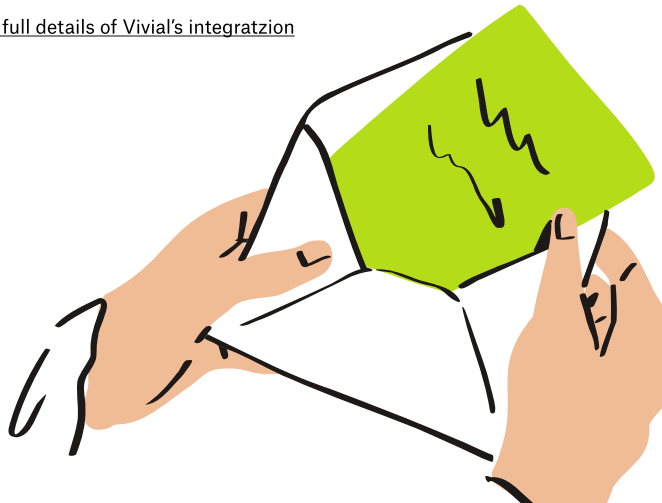
Vivial was looking for a way to send agreements for signature without leaving Salesforce and that created minimal disruption to its current eSignature users. HelloSign quickly emerged as the top contender to provide Vivial and their sales reps with a smarter, faster solution.

“What was refreshing about the implementation with HelloSign is that it was all intuitive from a Salesforce perspective, which is what I know,” says Eric Pohlabel, Vivial’s Sr. Salesforce Certified Advanced Administrator. “Implementation was 2X faster than our previous

application. It was night and day in terms of how quickly we were up and running.”

And the efficiencies speak for themselves. By integrating HelloSign into its Salesforce instance, [Vivial](#) is now serving 1000+ markets with its suite of marketing tools.

[Get the full details of Vivial's integration](#)



Integrations aren't as hard or as disruptive as you think (promise)

One of the biggest reasons businesses don't integrate more of their sales stack is that they think it's too technical or too disruptive to already workable processes.

The truth is, in most instances, integrating eSignatures into your sales cycle is fast and easy. If you're already using tools like Microsoft Word, Google Docs, MailChimp, or Dropbox, it's as easy as a quick installation. [Check out all of the HelloSign integrations.](#)

And for larger-scale integrations into CRM and other business systems, the HelloSign team has made integration a breeze.

DIY integration isn't your only option

If you think integrating eSignatures all sounds a bit too technical, there are third parties that can do the integration for you—that's how 59% of sales leaders in small businesses do it. [Check out some HelloSign partners.](#)

Maintain sales agility as you grow

Agility is vital for solo sales and growing sales teams alike. As businesses grow and scale, though, integrating time-saving tools and taking a holistic workflow approach to your sales cycle is imperative to maintaining that agility. HelloSign is one of those tools that's helping businesses make an impact as they continue to expand.

[Try the HelloSign integration today](#) and see how easy it can be to integrate into your sales cycle.

