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Ran Haimoff, Head of Customer Value Management, DocuSign

# VALUE REALIZATION REPORT

DocuSign®

# ValueCloud<sup>®</sup> Enables DocuSign to Deploy and Scale Customer Value Management

*When Ran Haimoff joined DocuSign almost five years ago he was only the second full time hire in the Value Engineering team. Previously, Customer Value Management (CVM) was one quarter of the role of one of the marketing team and they outsourced their business cases to a small consultancy. The consultancy used by DocuSign wasn't doing a bad job at all, creating business cases at a reasonable rate and an impressive spreadsheet tool. But there were a lot of limitations to speed, scale and success. They were leveraging a benchmark database, but data mining was manual and the data itself was hard to maintain.*

*Two years ago, Ran and his team set about looking for a more 'robust and scalable solution' that could help them deliver Customer Value Management across the enterprise. They, of course, looked at leveraging internal software resources, but quickly realized the process would be slow, deliver less than 20% of what they needed, and be difficult to maintain. This is the classic build versus buy argument, and the decision to look externally for a professional product was quickly taken.*

When DocuSign first started looking for a CVM platform, they found more options than they expected, and, after creating a detailed Request for Proposal (RfP) and sharing that with five vendors, they narrowed their shortlist to three. DecisionLink was one of the three and after much discussions and debate, they made the final two for detailed evaluation. The two finalists were selected because Ran felt, firstly, they shared his vision of what Customer Value Management should be, now and in the future, and secondly, they felt like teams that DocuSign could work with.

The major difference between DecisionLink and their nearest competitor at this stage was the nature of their solution. Because



**73% win rate  
improvement  
from leveraging  
ValueCloud<sup>®</sup>**

**DocuSign<sup>®</sup>**

**INDUSTRY: Electronic Agreements**

**EMPLOYEES: 3,900+**

**San Francisco, CA**



*“I felt like they had the right vision for the future, how holistic leaders are thinking about this platform. What it also came down to was how comfortable I felt with the people at DecisionLink versus the competitor. I felt like they could be a partner to innovate with going forward.”*

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ValueCloud® is an off-the-shelf solution, DecisionLink could quickly move forward with a pilot project. The other finalist could not, because of the large amount of customization needed. DocuSign quickly realized ValueCloud® was the only viable solution, not just because of the customization needed by other offerings, but also because of their limitations in capability and flexibility.

Following a successful pilot project, DocuSign asked DecisionLink to make updates to reflect and enable their own go-to-market plans. DocuSign had made the strategic decision to sell by use cases and not by product. This required a radical change in their whole marketing and sales enablement process and would need to be underpinned with CVM that was fast to deploy, easy to use and able to scale at speed.

Looking for a practical proof of concept, Ran deployed ValueCloud® to two small user communities for the first six months. Following the success of this project, funding was granted to release ValueCloud® to more than 450 quota-carrying reps, numerous account managers, customer success managers and customer success architects.

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Ran believes that starting small was good for DocuSign and that having a sandbox allowed them to get the solution and deployment right before they moved into rapid scaling. DocuSign also took a steady team-by-team onboarding and training approach, one that Ran says has paid dividends.

## Salesforce Integration Was Essential

Ran knows that for adoption, the dashboard in Salesforce was essential. Asking customer facing staff to connect with multiple tools is always going to be an uphill battle. This was something that they didn't have with their previous spreadsheet based solutions. Creating the closed loop between Salesforce and ValueCloud® is extremely valuable. This



contributes to making the sales team more value focused and allows them to create value based business cases, with all the required sales assets, automatically and autonomously.

*"I didn't want piece of software to be an Island. It had to work nicely within Salesforce. And with the other tools that we use internally, such as having an Okta integration..."*

**Ran Haimoff, Head of Customer Value Management, DocuSign**

This kind of autonomy is highly valued and was impossible to achieve with spreadsheets or with the previous outsourced consultative process. Autonomy and simplicity have led to much greater scale with reps using ValueCloud® in many more deals than before. Having a self-service solution for the entire customer facing team is essential.

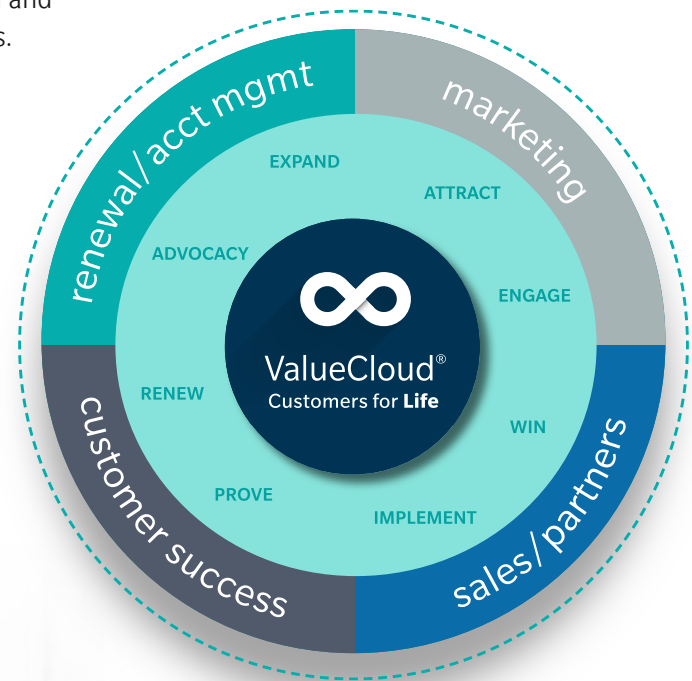
Since deploying ValueCloud® at scale DocuSign have built more than 500 business cases. They have seen an 73% uplift in new account close rates, and early indications show an increase in upselling. This is from many thousands of opportunities per year, so still a drop in the ocean, but a

clear path to increased and continued success. Ran and the team are aware that not all deals need CVM, but clearly many more would benefit from the addition of solid reliable, easily deployed business cases.

## A Brighter Future with ValueCloud®

Currently, ValueCloud is largely being used to generate business cases, but the whole team at DocuSign see it both scaling and extending throughout their customer facing processes. They plan to add more and more products to the platform to allow them to create models based on both product and end-user industry. DocuSign would like to use ValueCloud® to quickly assess the potential of an account. Something that ValueCloud® can do, once sufficient data is in the system. In the future DocuSign expect to have a better capability to pull up benchmarks and share them across multiple teams.

DocuSign is currently testing ValueCloud® with a small number of VAR (Value Added Resellers) and integrators with a view to bringing the tools that the internal sales teams benefit from to a wider audience.





Increase the output of the value consulting function.



Expand attach rate and overall share of wallet of an account.



Replace their overly complicated and difficult to use homegrown value solution.



Provide a means for company leaders and representatives across sales, product management, marketing, value management and customer success to achieve trusted advisor status and elevate conversations based on customer value.



Use of the Customer Value Management Platform for Account Based Marketing.



Use of the Customer Value Management Platform to extend Value Conversation to their Customer Executive Suites.



Use of the Customer Value Management Platform to facilitate and multiply Value into the Customer Care process.

In the final assessment, DocuSign are delighted with ValueCloud® for several reasons. Not only has ValueCloud® delivered improved sales results (73% improvement in new-co close-rates and improved upselling), it has allowed DocuSign to scale their Customer Value Management approach and live their philosophy of selling value, not product.

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Value selling is a strategic imperative at DocuSign and ValueCloud® has made that practical, tactical and scalable!

## Key Benefits:

- **73% uplift in new account close rates**
- **A modest increase in upselling**
- **Salesforce integration**
- **Ability to scale and automate processes**
- **CVM delivered autonomously by sales professionals**

## ABOUT DECISIONLINK

DecisionLink's ValueCloud® is the first and leading solution for enterprise-class customer value management. The ValueCloud® enhances the value of CRM systems by providing the missing link to elevating conversations and shifting relationships from tactical to strategic by providing value insights from initial sales call all the way through to contract renewals. The ValueCloud® turns customer value insights into strategic assets that can be leveraged across the enterprise, from CXO's, to line of business leaders, to Product Managers, to Marketers, to sales & sales support teams, to value managers. DecisionLink is trusted by top enterprise businesses including Adobe, Caterpillar, CrowdStrike, DocuSign, Marketo, VMWare and more.

**For more information, please visit [www.decisionlink.com](http://www.decisionlink.com), call 800.670.8301 or engage with us on social media**

