



WHITEPAPER

Automate These 3 Documents and Your Team May Throw You a Party

(Give you an award, buy you a drink, or name a holiday after you).

The number of custom and manually created documents floating around most offices is significant. Even documents created virtually and shared amongst teams have a tendency to be inconsistent and unreliable without a process in place for automating. This whitepaper will identify three documents an organization can automate by utilizing a document generation app to increase productivity and reduce errors.

Overview

We all love being recognized at work. Whether you're given a shout-out in a company-wide email or taken out to lunch by your boss, receiving recognition for your contributions to the team is just plain powerful. Unfortunately, awards for identifying better, faster ways of doing things don't exist – that we know of at least. But in light of today's focus on working more efficiently in the workplace, maybe they should.

Think for a second about the average office workplace. There are an unlimited number of administrative tasks happening daily. Some of these tasks may be efficient, while others could slow down the team without you even realizing it.

For example, a manual process, like creating a sales quote, could involve ten or more manual steps that add up quickly. What if nine of those steps were optimized? If we minimized these steps into two to three, or even a click of a button, the result could amount to multiple hours saved across the team.

The number of custom and manually created documents floating around most offices is significant. Even documents created virtually and shared amongst teams have a tendency to be inconsistent and unreliable without a process in place for automating.

Every team shares a common goal: efficiency. But the way they reach that goal and the tools they use to get there vary by organization. The last thing any team needs to jam up productivity is an overload of documents they need to create manually. Fortunately, there's innovative technology to help organize your team's lives.

When customer-relationship management (CRM) technology first hit the scene, managing customer interactions became irresistibly simple and paper trails were digitized. In 1999, our favorite cloud-based CRM solution, Salesforce, was engineered as a more cost-effective alternative to on-premise systems, significantly increasing efficiency.

Salesforce now functions as the top CRM platform out there. While this cloud-based software company focuses on their core competency, CRM solutions, Salesforce left room available for other players to add on different solutions to solve for varying issues. Their logic? Not every company needs the same tools or solutions. So, there's ample room and opportunity for other technologies to be engineered to work within the Salesforce platform, thus growing their ecosystem.

This ecosystem eventually became the Salesforce AppExchange.

The last thing any team needs to jam up productivity is an overload of documents they need to create manually. Fortunately, there's innovative technology to help organize your team's lives.

DOCUMENT GENERATION EXPLAINED

One of the opportunities that exists within Salesforce is a solution for quickly generating documents. Although Salesforce did not build a document generation functionality into their software, plenty of tools like S-Docs have been developed to bridge this gap. While we're obviously biased about which is the best tool, all document generation tools increase productivity and reduce errors.

Although there are a number of document generation apps out there that work alongside Salesforce, there's only one that is native-built on the Salesforce platform. Technically speaking, the term "Native App" refers to an app that is built entirely within the confines of the existing platform and does not rely on external systems or third-party web services. By nature, native apps are more secure, faster and easier to use because all processing occurs on the same platform. This ultimately saves time for the user, improves efficiency, upholds security and reduces errors.

So now for the meat of it – what you're looking for, why you downloaded this document. We've identified three documents that can be easily generated, automated, and result in faster more efficient teams processes. Automating these three documents may not win you an actual award, but you never know.

SALES QUOTES

When you are a member of a fast-paced sales team, the status of proposals, SOWs, and sales quotes is ever changing. Document generation apps enable salespeople to auto-create and send sales quotes the moment a status changes, rather than spending time updating documents manually at a much slower speed. Multinational electronics company Panasonic once ran into this very issue.

The Problem

Panasonic offers a large range of tech products and is no stranger to innovation. Optimizing time down to the second accumulates to hours saved for an electronics company like Panasonic and having a massive sales team with a variety of product lines requires an efficient process.

Aware of this fact, Panasonic had a legacy system in place for generating sales quotes for their sales team. They quickly realized the legacy system was too invasive for admins to use and required heavy lifting from their technical teams to customize and update sales quotes. Panasonic recognized how this was resulting in salespeople losing out on scalability as well as taking valuable time from their technical teams.

By nature, native apps are more secure, faster and easier to use because all processing occurs on the same platform.

Document generation apps enable salespeople to auto-create and send sales quotes the moment a status changes, rather than spending time updating documents manually at a much slower speed.

The S-Docs Solution

Panasonic began evaluating different document generation apps, looking for something that provided the customization their sales team required without the technical overhead. On top of that, Panasonic needed a solution that was easy, smart, and secure. By searching the top one percent of the Salesforce AppExchange, Panasonic settled on S-Docs as their new document generation solution.

With S-Docs, the sales team automated their quote process, and now generates sales quotes much faster, with the click of a button. And, their technical team can now focus on more strategic projects rather than spend their time updating templates. Brand consistency across all quotes and security compliance are both achieved with the S-Docs solution which resulted in happy marketing and security teams.

Today, Panasonic uses S-Docs every day. Not only do they rely on S-Docs to optimize their sales process, but they want to expand document generation across different divisions and incorporate different types of documents into their library – such as invoices, account summaries or receipts.

CUSTOMER CORRESPONDENCE LETTERS

An organization's customer service practices are crucial to their success and writing, and receiving correspondence from customers plays a major role. For larger organizations, generating customer correspondence with a document generation app can be a time-saving innovation. Nestle, an organization almost everyone has heard of, experienced this problem and solution in a big way.

The Problem

Nestle creates a variety of products from bottled water to pet food – not to mention one of our favorite candy bars. Notably, they are the largest food company in the world. A well-known company like Nestle sends and receives millions of types of customer correspondence on a daily basis – think coupons, vouchers, giveaways, discounts, and more.

In order to effectively communicate with every customer and field their varied requests, they needed a document generation tool. Initially, the system they had in place relied on too many manual efforts to generate and send customer correspondence. Although this worked for a while, Nestle soon realized they could improve their process tenfold by fully automating the creation and execution of all customer communication.

With S-Docs, the sales team automated their quote process, and now generates sales quotes much faster, with the click of a button.

For larger organizations, generating customer correspondence with a document generation app can be a time-saving innovation.

The S-Docs Solution

While searching for a document generator that would help improve their current process, Nestle found S-Docs. By adding document generation to their workflows, they're able to fully automate customer letters in a matter of seconds. Nestle's proprietary system that's in place works in tandem with S-Docs to generate, print, and fulfill customer letters.

Not only did S-Docs save Nestle an incredible amount of time and energy, they maintained the Nestle brand promise by keeping their millions of customers happy.

Nestle continues to use and love the S-Docs app, because of its ease-of-use and compliance capabilities. Thanks to S-Docs, they are now self-sustaining and extremely satisfied with how the software has revolutionized their business processes.

COMPLIANCE DOCUMENTS

Manual processes can be time-consuming and result in unintentional errors. Philips, another well-known multinational technology company, has a specific division dedicated to medical devices. Within their medical device division, technicians audit medical devices to ensure they function properly.

The Problem

Philips used a manual process to audit their medical devices, which involved an Excel spreadsheet. Technicians would manually update the spreadsheet according to relevant protocol, resulting in high inefficiencies of technicians spending too much time on manual updates and entering tedious data points. If the data ever needed revision, the spreadsheet was bulky and difficult to modify. Additionally, the inconsistency of data populated into the Excel sheet resulted in disjointed and inefficient results.

The S-Docs Solution

The S-Docs solution eliminated these issues. By simply dropping their bulky Excel spreadsheet into a S-Docs template, the team could automate most of the data required – such as account name, device type and last update straight from Salesforce. With these figures automated, the technicians could focus their attention and time on updating important details about the device's performance and maintenance status. This eliminated the need to copy and paste from multiple documents in order to generate this report, all of which reduced errors and saved time.

With the ability to edit documents on the fly and create fully custom templates, Philips now achieves consistency across all technicians throughout their entire client base. This makes their data capture more efficient and device audit protocol more secure.

By adding document generation to their workflows, they're able to fully automate customer letters in a matter of seconds.

With the ability to edit documents on the fly and create fully custom templates, Philips now achieves consistency across all technicians throughout their entire client base.

Philips relies on the S-Docs solution to keep their data safe while also enabling users to modify data on-the-go. They frequently add additional licenses to accommodate more field technicians, and are looking to increase adoption throughout other divisions of the company. It's these features that empower Philips to continue expanding S-Docs across other divisions of the company.

At this point, the benefits of implementing document generation into your day to day work process should be evident. Not only does a document generation app save your team time and headache, the reduction in manual tasks results in money saved and no wasted effort. Clearly, a solution like S-Docs works seamlessly across all different types of organizations, making it that much more of a must-have.

OUR PURPOSE

Founded in 2010, S-Docs was engineered by a former director and technical architect at Salesforce who recognized the importance of building a completely native document generation app. The purpose of creating S-Docs was to help businesses achieve higher efficiency and success while using Salesforce. The power and ease-of-use of S-Docs has put the app in the top one percent of all apps on the Salesforce AppExchange.

What's more, the S-Docs solution is the only native document generation app of its kind. Because it's built on the Salesforce platform, S-Docs offers fast, easy, and, most importantly, secure document generation capabilities all without requiring you to leave Salesforce.

If you're not convinced by now that implementing a native-to-Salesforce document generation tool will save time, increase efficiency, and maybe just win you some recognition from your team, then we encourage you to sign up and try it for free by following the link below.

[Sign up and try it for free by following this link.](#)

Not only does a document generation app save your team time and headache, the reduction in manual tasks results in money saved and no wasted effort.