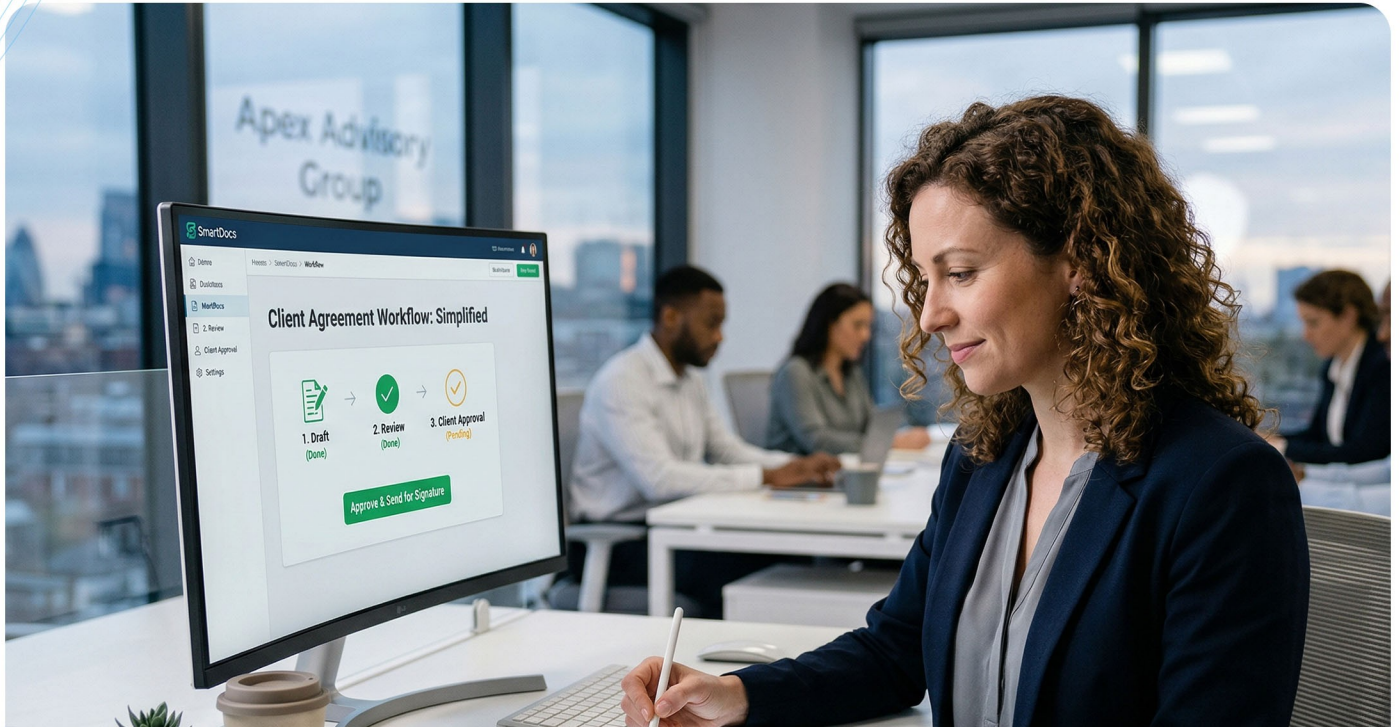




Agreement Workflow Accelerated for a Leading Professional Services Firm with InstantDocs



Industry

Professional Services



Company Size

51-200 Employees



Region

North America



Featured Solution

360 InstantDocs Agreement Automation

The Customer

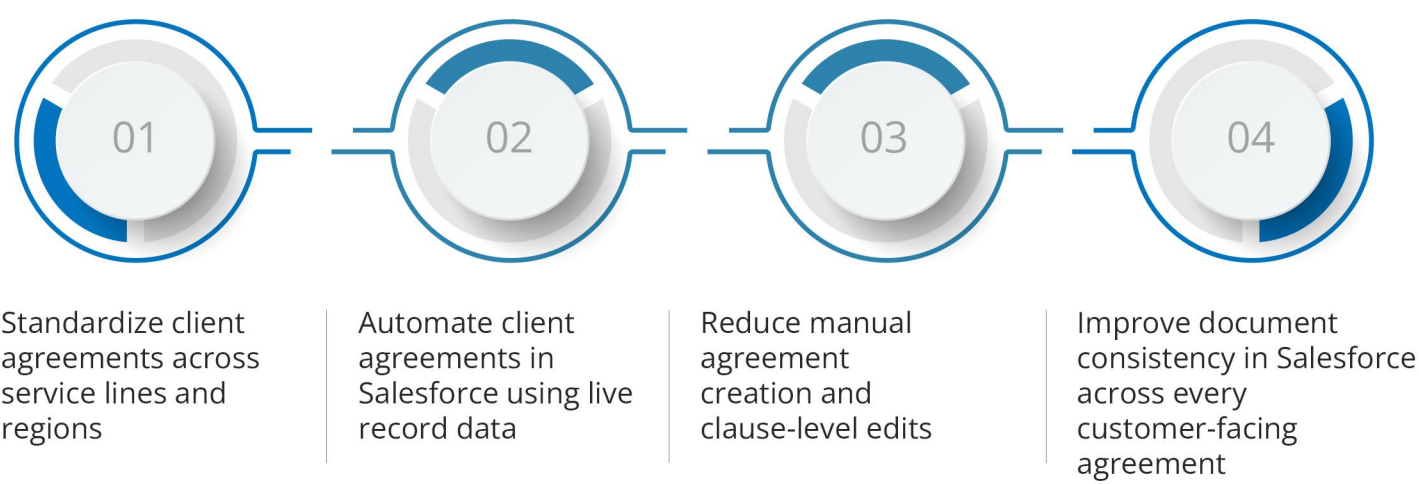
Our customer is a leading professional services firm delivering consulting, implementation, and advisory engagements across multiple service lines. As the business scaled, agreement volume increased across new projects, renewals, and change requests. The firm needed a better way to standardize client-facing documents and support client agreement generation in Salesforce without depending on manual drafting and repeated formatting work.

Problem Statement

The customer’s agreement process relied on static files, copied clauses, and manual edits across teams. This made it difficult to standardize agreements in Salesforce, slowed down the Salesforce agreement workflow, and created inconsistency across client documents. Legal, delivery, and account teams were spending too much time reviewing formatting, fixing outdated language, and tracking the right version of each agreement.



The Challenge



The Solution

We implemented 360 InstantDocs to support professional services agreement automation directly inside Salesforce.

Built reusable agreement templates in InstantDocs	Used Salesforce merge fields to pull in client, project, and commercial data	Applied conditional logic to show the right clauses by service type and engagement terms
Added template versioning to keep only approved agreement language active	Used Flow-based automation to trigger the agreement workflow faster	Saved generated agreements to Salesforce Files and enabled direct email delivery when needed

The Outcome

With 360 InstantDocs the customer replaced a fragmented agreement process with a more structured and scalable document workflow inside Salesforce. The team could automate client agreements in Salesforce, reduce manual drafting effort, and create more consistent agreements across departments. Standard templates, live field merging, and controlled versioning helped the business move faster while improving trust in every client-facing document.

The Impact

41% Faster client agreement generation in Salesforce

90+ agreement preparation hours saved per quarter

Client agreement turnaround reduced by 2 business days

Fewer review cycles lowered legal and ops workload

Contact Info

1968 S. COAST HWY 1412, LAGUNA BEACH, CA 92651

🇺🇸 +1 323 641 4417 | 🇬🇧 +44 740 327 9473 | 🇦🇺 +61 48885 3632 | 🇮🇳 +91 852 710 0131

✉ contact@360degreecloud.com

