



Deal Friction Reduced for a SaaS Company with Automated Contract Generation by 360 InstantDocs



Industry
SaaS



Company Size
201-500
Employees



Region
Atlanta,
Georgia



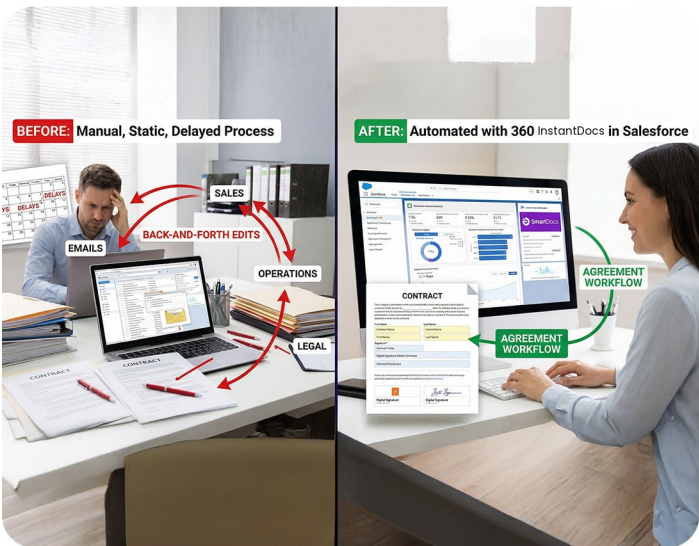
Featured Solution
360 InstantDocs Contract
Automation

The Customer

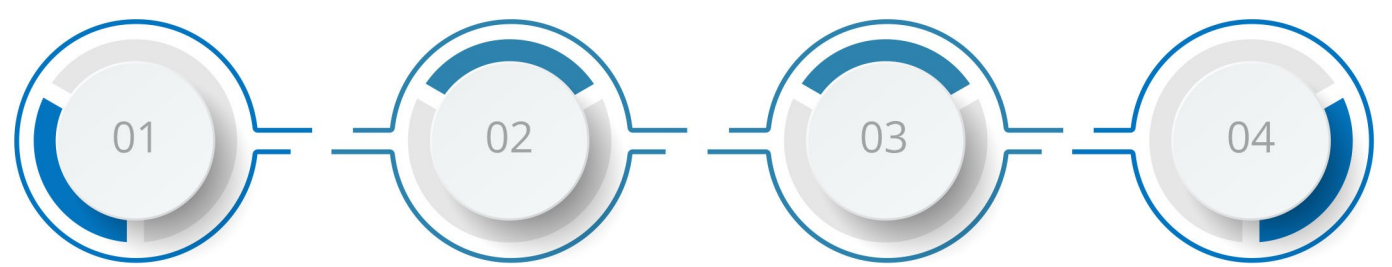
Our customer is a growing SaaS company managing subscription agreements, implementation contracts, renewals, and commercial addendums across multiple sales teams. As deal volume increased, the business needed a more scalable way to support salesforce contract automation for software companies without relying on manual drafting, copied clauses, and repeated formatting work.

Problem Statement

The customer’s contract process depended on static files, manual data entry, and back-and-forth edits between sales, operations, and legal. This slowed contract generation in Salesforce, created delays in the agreement workflow, and made it harder to maintain consistency across customer-facing contracts. The team needed a better way to automate contracts while improving accuracy and achieving faster contract turnaround.



The Challenge



Reduce manual drafting and contract preparation effort

Standardize contract creation across sales and legal teams

Improve the agreement workflow inside Salesforce

Support faster contract turnaround without sacrificing consistency

The Solution

We implemented 360 InstantDocs to bring contract generation in Salesforce into a more structured, scalable workflow.

Built reusable contract templates in InstantDocs

Merged customer, deal, and subscription data directly from Salesforce

Used conditional logic to show the right clauses based on plan, term, and service scope

Enabled one-click contract generation from Salesforce records

Added template versioning to keep approved legal language current

Saved generated contracts to Salesforce Files and supported direct email delivery when needed

The Outcome

With 360 InstantDocs the customer replaced a fragmented, manual process with a more reliable contract workflow inside Salesforce. Sales teams could generate contracts faster from live CRM data, while operations and legal gained stronger control over language, formatting, and version consistency. The result was better salesforce contract automation for software companies, less manual effort, and a smoother path from closed deal to customer agreement.

The Impact

Contracts sent
to customers
2.5 days
faster

Sales and ops
teams saved
100+ hours per
quarter

Faster contract
turnaround
helped reduce
deal friction

3x higher contract
volume without
increasing
operations effort

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

