Edinburgh Research and Innovation Ltd Reduces Approval Times from Weeks to Hours

Leading UK university accelerates the speed of business with DocuSign for Salesforce

Company's Top Objectives

Edinburgh Research and Innovation Ltd (ERI) is well established as the leading technology transfer office in Scotland. ERI's primary role is to commercialise the world-class research and academic expertise at the University of Edinburgh to potential funders, collaborators, licensees or investors.

ERI has established almost 2,500 industrial collaborations in the past five years, helping staff and students set up 180 new start-up businesses, many award-winning, thereby strengthening the University's position as one of the top-performing enterprise universities in the UK.

The organisation aims to make it easier for business and industry to engage with the University of Edinburgh by developing fruitful partnerships through knowledge exchange, and thus implemented DocuSign to accelerate future activity.

Business Challenge

For over 40 years, the University of Edinburgh has successfully commercialised the world-class intellectual property (IP) it generates, with a track record of groundbreaking and notable achievements through the efforts of its technology transfer office. As the commercial arm of the University of Edinburgh, ERI connects external parties such as companies and individuals to the IP and research that's carried out within the University.
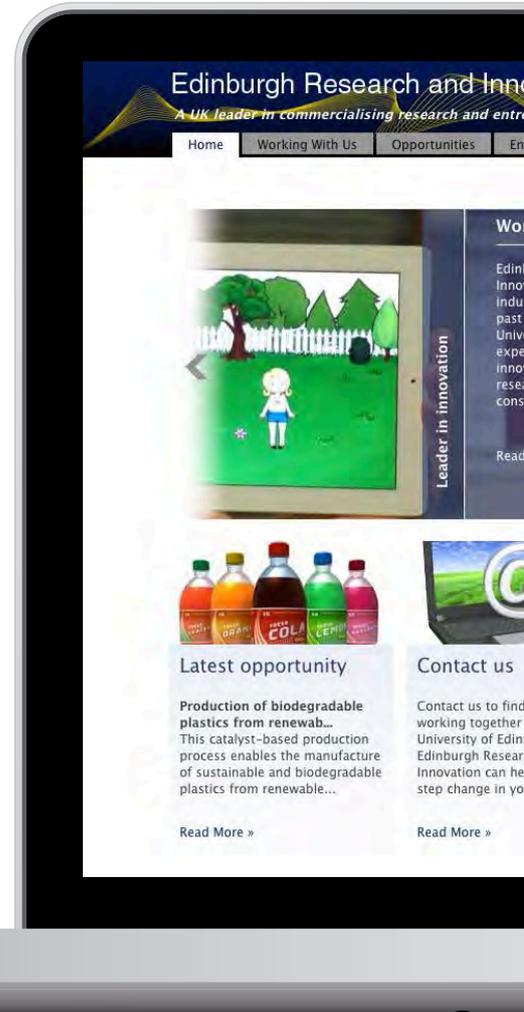
Top Benefits Achieved

- ✔ Approval times reduced from weeks to hours
- ✔ Significant cost savings on paper and postage
- ✔ Increased productivity of staff
- ✔ Stellar support to maximise ERI's investment
- ✔ Document storage with 24/7 access

Its customers can be the academics that reside within the University, or a company working with the University. As part of ERI's work, the division often has its academics consult with an external company. When this happens, the head of the respective school has to approve and sign off on the academic to consult.

The system that ERI was using to gather information and gain approvals was manual, with administrators having to type up the necessary documents before posting them out. Stewart Anderson, IT Manager and Senior Consultant at ERI, describes the previous process, "The same person would be responsible for chasing a signature when required and, of course, if they went on holiday or were away from the office, we encountered problems because no one else knew to chase the documents up."

This process would take up valuable time from ERI, six days on average, so the division sought to streamline the process by implementing electronic signatures.

"We are finding that people expect documents on demand. They expect transactions instantaneously," says Anderson, "We found out about electronic signatures and we sought to use them to make our approval processes much quicker."

ERI therefore required a solution that would enable a quick and easy sign off of documents, while integrating seamlessly with its Customer Relationship Management (CRM) system, Salesforce.

The Resolution

ERI chose DocuSign's Digital Transaction Management platform to automate its paper-based processes, primarily due to its extensive workflow capabilities and its incomparable integration with Salesforce. ERI uses DocuSign for Salesforce to send, sign, and manage important documents, from any device and without ever leaving Salesforce.

"DocuSign is a perfect fit. It extends the capability of just being able to sign. You might want to grab some additional information or set up a hierarchy of whom it's going to, and who's going to get a copy. All of that is quite advanced, but underneath, DocuSign handles that really simply," says Anderson.

ERI leverages the DocuSign APIs to automate workflows and eliminate manual routing. The documents route to the appropriate parties in the proper order, and Anderson and his team can view the document status at any point in the workflow.

"Having the capability to set up this seamless transition between these two powerhouses of Salesforce and DocuSign in under half an hour was just brilliant. I was quite amazed by the whole setup and how easy it was," says Anderson.

DocuSign's bank-grade security was also a deciding factor for ERI, according to Anderson; "Security is essential to us, as much of the data that we process is sensitive. There might be information related to patents, for example, which might not be approved yet, but we need sign off on one part of that patent. So security is paramount, and that's why we trust DocuSign to uphold that side of it."

> "
> What used to take weeks, now takes hours. We don't need to involve postal services or anyone to chase; we can do that automatically with DocuSign."
>
> **Stewart Anderson,
> IT Manager and Senior Consultant**
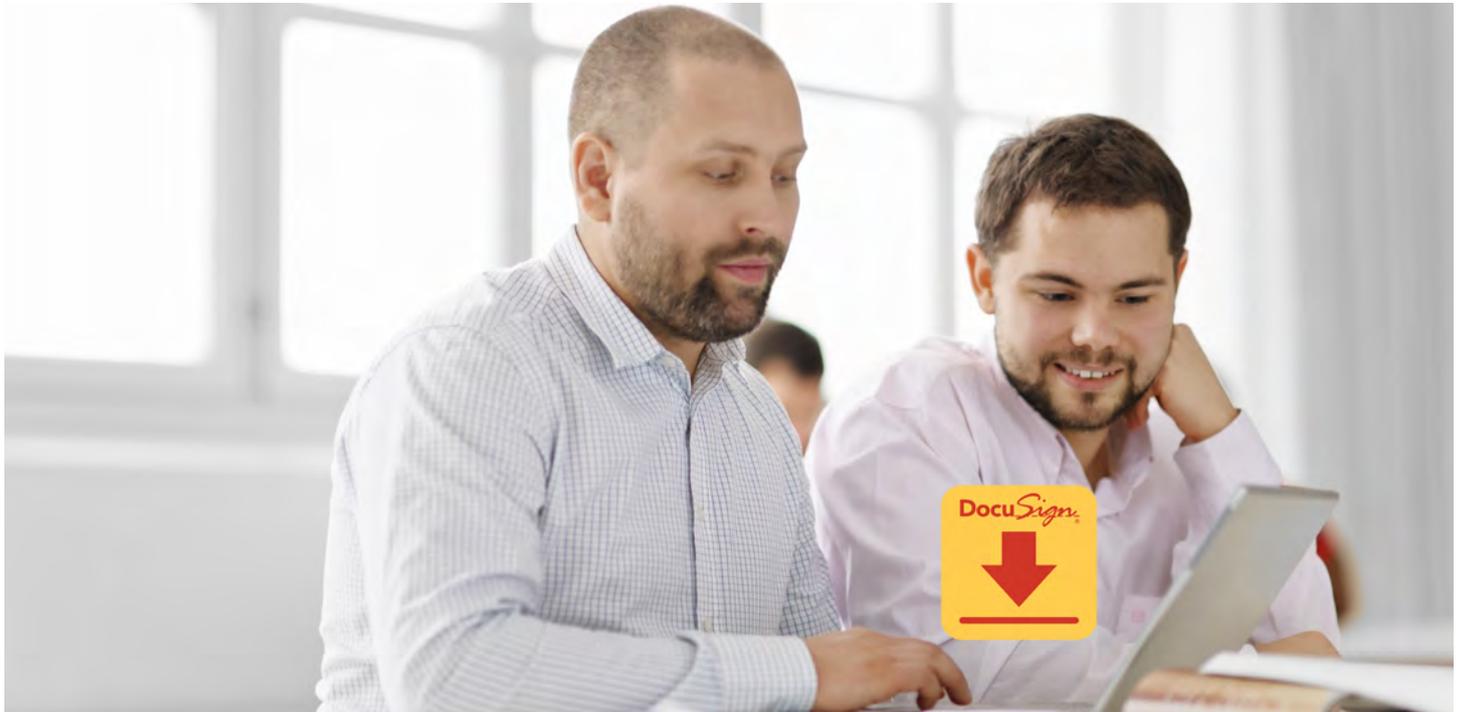
DocuSign's comprehensive approach ensures the security, privacy, compliance, and enforceability of ERI's transactions.

The Key Benefits

Together with DocuSign, ERI has digitally transformed its previously archaic approval process, making it seamless and streamlined, thus allowing the organisation to hire out academics sooner and conduct more business.

"There's huge value between Salesforce and DocuSign. They really complement each other as systems and both have their own unique points of interest. Salesforce stores all of your data and the responses, and DocuSign performs the heavy lifting, the chasing, which would typically take time out of your day to do," says Anderson.

In addition to the cost savings achieved by reducing paper usage and postage, approval times have reduced significantly as decision makers can review and approve a document within minutes.

"What used to take weeks, now takes hours. We don't need to involve postal services or anyone to chase; we can do that automatically with DocuSign," says Anderson.

ERI makes use of DocuSign's automated reminders so administrators no longer need to manually chase documents that have been sent for signature. Once completed, a copy of each document is stored in DocuSign and Salesforce, with both senders and signers having access to documents online at any time, with the ability to download and print as needed.

"Signers like to be able to go back in and view documents that they've signed in the past. They can do that at any time without having to come back to us to ask for the copy of the document," Anderson continues, "Storage is very important too, so having DocuSign store all the documents for us in one place takes the task off of us."

The impact to ERI has been far-reaching, with the most significant return on investment arriving from the improvement in turnaround times and productivity gains. However, Anderson also highlights the high level of customer service that DocuSign delivers.

"The support from DocuSign is fantastic. Not only will they will help you solve the problem that you've gone to them with, but they'll also try and understand what leads up to that part of the process and what happens thereafter," says Anderson, "That's the real key for me, that they want to understand. Once they've done that, you've got a much better system, and you've made the most of your investment in DocuSign."