



Case study production grows 300% with Nintex Drawloop DocGen® for Salesforce

Strategic Growth automates and streamlines case study processes with Nintex DocGen for Salesforce.

Organization

Strategic Growth, Inc.

Website

strategicgrowthinc.com

Industry

Professional Services

Country

United States

Business situation

Strategic Growth produces case studies as a sales tool for itself and for Salesforce. But the process was slow and unreliable, and didn't always comply with the Salesforce template.

Solution

Strategic Growth adopted Nintex Drawloop, which automatically creates documents that merge a company's Salesforce data with custom templates. Consultants click a button in Salesforce to kick off the process and Nintex Drawloop automatically populates the latest slide template with customer data, with consultants adding any additional details.

Benefits

Case study production rose by 300 percent
Consultants always use up-to-date templates
Process is faster, more reliable and more predictable

A case study about case studies

“Our sales people are better equipped for success with the case studies we produce with Nintex Drawloop. And because we share these studies with Salesforce, their sales people are also better equipped.”

— **Caleb Sidel**, Vice President and Chief Architect, Strategic Growth, Inc

This is a case study about case studies—and about how building better case studies can result in building a better business, too.

Case studies are an increasingly important part of corporate marketing. To optimize their effectiveness, case studies need to reflect the prospective customer’s industry, region and business—and be new enough to remain relevant in a fast-moving world. Most companies need a robust process to meet this goal.

Since the software they’d been using hadn’t seen development in three to four years, shifting to online has been “a big challenge for our users,” says Caleb Sidel, Vice President and Chief Architect at Strategic Growth. Which is part of the reason he chose Nintex Drawloop.

Parts of the original process was slow and unpredictable

For example, take Strategic Growth, Inc. It's one of the top Salesforce Gold Consulting Partners in the US and has long had an active case-study generation process. But elements of that process were slow and unpredictable. After completing a Salesforce implementation for a client, a Strategic Growth consultant would manually fill out the case study slide template provided by Salesforce. Sometimes consultants did this only weeks or months later. Sometimes they didn't capture all relevant data. If they cut and pasted into a template on their local PC drive instead of downloading the latest template, someone would have to take the time to recreate the case study in the correct format. Strategic Growth met Salesforce's case study quota, but wanted to go above and beyond by eliminating the manual steps.

"We used to email everyone, reminding them to download the new templates," says Sidel. "If they didn't, we'd get useless results. We wanted a process that was faster, more accurate, more consistent."

Nintex DocGen creates documents quickly, accurately and predictably

To solve their challenge, Sidel and his colleagues turned to Nintex Drawloop's document generation service. Nintex Drawloop creates documents quickly, accurately and predictably by merging Salesforce data into any combination of document templates.

When consultants complete and close a project, they kick off a case study by clicking a button on the Project Summary object in Salesforce. Nintex Drawloop accesses customer data from the company's Salesforce database and instantly populates the latest slide template. The consultants provide additional details to complete the case study.

Using Nintex DocGen to showcase what digitized means

The ease and comfort of use, he says, is what makes document generation such a strong solution.

"Nintex removes our dependency on paper-based forms, it offers the ability to track statuses and, in combination with Salesforce, Nintex Drawloop automates business processes."

This show-rather-than-tell solution communicates much more strongly to a staff used to the presence of years of project binders, who may be reluctant moving processes online.

Consultants always use the right template

“We’re seeding opportunities, building momentum. One win leads to other wins—and to other case studies. That’s what we get from Nintex Drawloop.”

— **Caleb Sidel**, Vice President and Chief Architect, Strategic Growth, Inc.

Sidel, who helps manage case study generation for Strategic Growth, likes that his consultants can’t inadvertently use the wrong template. “I can’t control when Salesforce will change the layout or graphics of the template, but I can ensure that consultants always use the right one,” he says.

Both Sidel and his consultants save time by using Nintex Drawloop. A consultant who puts several case studies in the wrong template and has to redo it—or have Sidel redo it—can waste hours. That doesn’t happen anymore.

“We’ve made case study generation so convenient, quick and reliable, there’s no reason for a consultant not to do it and do it right,” says Sidel. “The results are accurate and predictable. It never fails—you just click a button and you’re good to go.

Case study production soars, exceeds Salesforce quota

Because their case study production is faster, easier and more reliable with Nintex Drawloop, Strategic Growth is producing more case studies more quickly. Sidel estimates that case study production is up by 300 percent, far exceeding the Salesforce quota.

“When it comes to case studies, the more the better,” says Sidel. “When people ask for a recent success story in a particular business, industry and region, I have a choice in what I give them. I can almost ask, ‘Which of our 600 stories do you want?’”

And because case studies are important sales tools, better-targeted case studies can mean more sales. “Our sales people are better equipped for success with the case studies we now produce with Nintex Drawloop,” he says. “And because we share these cases with Salesforce, their sales people are also better equipped, and Salesforce promotes us more often by sharing our case studies with potential customers.”

The return on investment with Nintex Drawloop is incalculable. “When a case study contributes to making a sale, it’s not just the one sale that we benefit from,” says Sidel. “We’re seeding opportunities, building momentum. One win leads to other wins—and to other case studies. That’s what we get from Nintex Drawloop.”

About Nintex

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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