



Music company strikes all the right notes with **Nintex Drawloop DocGen® for Salesforce**

Yamaha reduces the time it takes to create legal contracts from weeks to minutes.

Organization

Yamaha

Website

www.yamaha.com

Industry

Retail

Country

United States

Business situation

Yamaha's music and audio sales division needed a streamlined and faster solution to complete legal contracts and agreements – and secure the necessary sign-offs from multiple retailers and individual dealers.

Solution

Yamaha – a power Salesforce and DocuSign user – turned to Nintex DocGen for Salesforce to manage the entire document creation process through one system, directly merge Salesforce data into documents and send a single package of documents to retailers and dealers.

Benefits

Reduced document creation time from weeks, or even months, to just minutes
Instant visibility into contracts instead of hours-long searches
Unified “One Yamaha” brand through consistent documentation

Business success can create business challenges

Yamaha is one of the world's leading suppliers of musical instruments and audio equipment to students, professional musicians and recording artists. Business growth has resulted in different divisions for the company's diverse product and distribution channels – including PAC (guitars, amps, drums), band and orchestral (marching band, rose parade) and the keyboard division.

Each division possesses its own separate set of legal exhibits and agreements that dictate how its products can be marketed and sold. And each division sells to retailers that have dozens or even hundreds of store locations or dealers. Manually creating all those documents proved problematic, making Nintex DocGen very appealing.

“Nintex DocGen provided the functionality to complete our entire document process without ever leaving Salesforce,” said Mike Machado, Yamaha C.R.M. Manager for the Customer Experience Group. “We wanted our end users to just ‘press a button’ and that’s exactly what we got with Nintex DocGen.”

Manual process can't keep up with licensing demands

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— **Mike Machado**, C.R.M. Manager, Yamaha

If a national account carries products from both Yamaha's PAC and Piano divisions, Yamaha requires a Master Dealer Agreement and legal agreements for each division. That agreement gives each location permission to sell the products and also dictates how those products are sold (in store or online).

Previously, the PAC and Piano divisions would manually complete and send those documents. That often meant several emails containing multiple documents. Not surprisingly, the volume of emails and documents completely confused the retailers, and they often overlooked or forgot to fill them all out.

Although a Salesforce and DocuSign user, Yamaha had to go outside both environments in order to complete documents. The company wanted a document automation solution that could eliminate manually creating documents and simplify the process so Yamaha internal users only had to go through one app to achieve this. DocuSign – a Nintex partner and platform user – recommended Nintex DocGen.

Yamaha creates a single document package for complex process

The first project that Yamaha tackled was automating the credit application process. Mike's team created a Nintex DocGen document package that included the credit app and other supporting documents. Because the document package dynamically pulls data directly from Salesforce, several fields on the credit app were filled out, enabling the customer to just fill in the blanks and electronically send it back.

Nintex DocGen also helped Yamaha automate one of its biggest headaches – the generation, assembly and distribution of master dealer agreements (MDAs), and legal agreements and exhibits from Yamaha corporate and divisions to retailers and their dealers.

This process was highly complex. With Nintex DocGen, Yamaha created a single document package that contained: a customized cover letter; the corporate MDA (parent contract); legal exhibits between each division and dealers establishing a legal relationship and authorizing multiple retail locations (child contracts); and multiple distribution agreements from the Yamaha divisions for each retail location (child contracts).

“Prior to Nintex DocGen, it took corporate and our divisions weeks, even months, to prepare and send our legal agreements to our retail partners,” Mike says. “Now, the user literally has to push a button in Salesforce and within minutes, the entire envelope is generated.”

Visibility into contracts that didn't exist before

Automating its MDA process was a huge achievement but Yamaha wanted to take it one step further. Although the parent and child legal exhibits were packaged into a single document package, they weren't associated with each other. And once completed, only the MDA was automatically updated in Salesforce, meaning people still had to manually update exhibits.

Yamaha further improved the process by building in triggers so that when it received a signed document package, both the parent and child agreements would be automatically updated and the history recorded in Salesforce.

"Nintex DocGen provided visibility into our contracts that previously did not exist," Mike said. "Now we can view updated information at both the child and parent level. Before, it would take hours to update the child contracts or query to find them."

Yamaha has almost 30 users in almost every organization, from Sales to Marketing to Finance. They're automating document processes, from product schedules to credit applications with document generation. Each group continues to find new opportunities to use Nintex DocGen and improve their team productivity.

"The Nintex team has been a great partner," Mike says. "No matter what the issue or problem we needed to address, the team has always come through for us."

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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