

## Getting more contracts out the door for clients in less time and with fewer errors.

Orion Advisor Services LLC is a leading integrated portfolio accounting platform for financial advisors, offering a suite of technology and services. They have \$375 billion in assets under administration and serve over 950 advisory firms.

### A scalable contract management solution for a growing company.

#### Orion's process needed to better support negotiated contracts.

Orion was founded in 1999 and, in the beginning of their business, they were able to execute new contracts with little client negotiation. Most of their contracts were standard templates that they stored in DocuSign, which worked for them until the company began to grow more quickly. As the company and industry began to expand, Orion's standard contracts were negotiated more often to meet clients' specific requirements. As their contracts became less standardized, Orion realized it had outgrown its contract process.

### The contract process was inefficient and exposing Orion to risk.

#### Orion's sales reps needed to make minor edits on contracts without handholding from Legal.

Unable to rely on a few standard contract templates, Orion experienced two major problems. First, the handful of templates they had in DocuSign grew to over 20, and since adjustments couldn't be done easily in DocuSign, Orion's sales reps had to submit all changes to the Legal department. Legal was using valuable time making small changes like updating numbers or removing single words from contracts — something sales reps could have made on their own if their solution had more robust functionality.

## Overview

### Retail

Industry

### 205–500

Company size

### Omaha, NE

HQ location

### 1999

Founded

### Contract Management

Use case

**“We live and breathe through Salesforce and all of our apps are integrated. A CLM solution connected with Salesforce was a non-negotiable and DocuSign CLM provided that and more.”**

**Robin Danahy**  
Salesforce Administrator

Second, because the 20+ contract templates had such small differences between them, mistakes were being made and incorrect contracts were being sent to clients. Version control was lacking and there was no visibility into the changes being made to the contracts. Sales Operations, Legal and Sales all needed a tool that would allow them to collaborate efficiently and reduce the number of client-facing errors made in the contract process.

## **Infinite storage and integration with Salesforce and DocuSign.**

### **Orion Advisors and DocuSign CLM seemed like a natural fit.**

Orion's search for a tool that would solve its contract issues yielded DocuSign CLM. Orion and DocuSign CLM quickly learned that the cultures of both companies were very similar and that DocuSign CLM could provide all of the product functionality that Orion needed. Orion was a devoted Salesforce customer, but found that Salesforce add-on's couldn't provide the storage space they needed for their documents. DocuSign CLM's Platinum Partnership and complete integration with Salesforce – and DocuSign – was key in the purchasing process for Orion Advisors.

## **Orion's contract processing time shrinks by 75%.**

### **Sales and Legal are working efficiently and effectively thanks to customizable, approved contract templates.**

With DocuSign CLM's central repository, contract generation, template and redlining functionality, Orion Advisors is getting more contracts out the door to clients in less time and with fewer errors. Their previous process would have taken them a minimum of 48 hours to turn a contract around. Now, they are able to do it in 12 hours. In addition to saving time, one of the key benefits for Orion is the ability for sales to own their process and not have to wait for Legal to update contract language. Legal is happier and more productive because they know that the approved templates are being used and that Sales can make small adjustments on their own. Sales is happier and more productive because they feel empowered to make edits on their own timeline and aren't being slowed down by an unnecessarily lengthy process.

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**“Sales wants to own the process. They don't want to wait for Legal. DocuSign CLM allows them to make their own changes to the contract and get it out the door so much faster, which has improved the communication and relationship with Legal.”**

**Robin Danahy**  
Salesforce Administrator

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#### **About DocuSign**

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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