
Sunrun makes going solar convenient and transparent with DocuSign and Salesforce.

Home solar has taken off in the US with more consumers opting for control of their own clean power. Sunrun is the leading residential solar company in the US with over 255,000 customers and 1,760 megawatts deployed. This has offset over 3,700,000 metric tons of CO₂ to help protect the environment.

When customers purchase or finance solar, they often enter into a 20+ year agreement with Sunrun. The sales team goes through many steps including a home evaluation, design and equipment selections, price quote, service contract terms, net energy metering agreement, financing options, installation approvals, and much more. This complex process makes the agreements very important to a successful partnership over the life of the solar system.

As Sunrun scaled, they needed to deliver more convenient service to customers and operate more efficiently. They chose DocuSign to enable a more streamlined contracting process that was transparent to the customer and saved time getting contracts executed.

“We want to be the guide to take the customer through a 25-year relationship,” says Suriya Gurumurthy, Sr. Director of CRM Engineering at Sunrun. “DocuSign plays a critical role in that process.”

A seamless integration.

Sunrun didn't want to disrupt the way their field and inside sales teams engaged with customers - on an iPad with their Point of Sale (POS) system, which is built on Salesforce. It was critical that any new system would work smoothly with their CRM and POS systems.

Sunrun built a deep integration into Salesforce that allowed reps to generate documents based on data in Salesforce, execute contracts with the customer in the field or remotely, and bring details back into Salesforce for immediate visibility for the rest of the team once the contract is complete.

“From a contract review perspective, DocuSign makes the review process easier than with wet sign because we don't have to worry about illegible handwriting, check each page for modifications, or confirm that every page is present,” said a Contract Manager at Sunrun. “Our team was able to shave minutes off each review completed through the Salesforce integration.”

Results

One visit

A single 3-hour visit to evaluate and agree to service down from multiple hours-long visits.

10x

The same small contracts department is now capable of handling ten times the amount of volume.

>95%

Almost all signatures are executed with DocuSign.

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Suriya Gurumurthy
Sr. Director of CRM Engineering at Sunrun

More efficient field sales that operate at scale.

As Sunrun grew, they needed to operate more efficiently. Now, with DocuSign integrated deeply into the Salesforce platform, hundreds of users including reps, inside sales, project coordinators and contract review see everything in near-real-time without errors. The same contracts department is now capable of handling ten times the amount of volume. The experience of going solar is now much smoother than before only requiring one 3-hour visit on average, down from multiple visits that often spanned days or weeks.

“DocuSign clicked right into the systems we already used to engage with and manage our residential customers and streamlined one of the most challenging parts of our sales process – signing on the dotted line,” said a Sales Operations Director at Sunrun. “We literally couldn’t have scaled with demand and met our customer’s expectations without DocuSign.”

A better experience for partners and customers.

Sunrun also sells solar through multiple channels including retailers like Costco, Home Depot, and others. This adds more complexity to the sales process, requiring paper-based contracts to be shuffled back and forth. Specifically, rebate agreements had to be dropped off by the consumer and picked up by Sunrun in-person. With DocuSign, Sunrun can now send these agreements directly to the customer, automatically receive it back and share with the reseller partner for a much faster and more convenient experience.

This modern system of agreement at Sunrun benefits the customers most. Gurumurthy says it best, “Not only can customers go through the entire complex evaluation process in person, over the phone or online as is most convenient for them, they also have complete transparency into all elements of the agreements digitally. Better service, happier customers and more efficient operations – it’s a win, win, win!”

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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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