



# Connecting customers and companies with fast service.

Yodel delivers fast, reliable service by automating sales workflows with Adobe Sign, Salesforce, and Conga.

## YODEL

*"Adobe Sign gives our workflows the boost we need to improve productivity and reduce costs."*

*Edgar Zamora, Head of CRM, Yodel*

### SOLUTION

Adobe Sign, an Adobe Document Cloud solution

Salesforce CRM

Conga Composer

### RESULTS



**REDUCED** signature cycle time **88%**

**20%** Shorter sales cycle for faster **ONBOARDING**



Complete, **ACCURATE** audit records



Anyone can **SIGN** without special software



## Yodel Delivery Network Limited

Established in 2010

Workforce Peak of 13,500

Hatfield, United Kingdom

[www.yodel.co.uk](http://www.yodel.co.uk)

### CHALLENGES

- Reduce delays in the sales life cycle to start earning revenue faster
- Start onboarding and working with retailers faster
- Improve communications and approvals with service centers
- Remove time-consuming, manual administrative steps to increase productivity

### Commitment to fast, reliable service

Today people are shopping for almost everything online, including clothing, toys, electronics, and groceries. While price is often one of the main ways online companies attract consumers, the importance of fast, efficient delivery cannot be underestimated, especially as they compete with traditional brick-and-mortar stores.

Yodel Delivery Network Limited delivers more than 155 million parcels a year for many of the United Kingdom's leading retailers. Yodel bridges the gap between retail warehouses or distribution centers and customers' homes and businesses.

The Yodel sales team works with retailers across the UK to understand their delivery needs and get their goods into the hands of their shoppers. Edgar Zamora, Head of CRM at Yodel, looked closely at how he could help the sales team improve operations. In particular, Zamora noticed that one of the most time-consuming parts of the sales cycle concerned generating, sending, and signing sales agreements with retailers.

"If we could streamline the agreement stage of the sales process, we could reduce the time spent onboarding retailers," says Zamora. By integrating the Salesforce CRM solution with Adobe Sign, an Adobe Document Cloud solution, Yodel can process sales agreements electronically and reduce the workload for both sales teams and retailers.

"Adobe shares our commitment to quality and customer service, so we knew that we could rely on Adobe Sign to work for us," says Zamora. "If we have questions, Adobe will be right there as we continue to develop our business."

### Signed agreements in two days

Before Adobe Sign, completing sales agreements with retailers could take weeks. The sales representative would wait for an administrator to prepare the document, and then deliver the agreement either in person or via mail. On average, it took 17 days for a retailer to return a signed document, but in some cases it could take up to a month.

"The faster we can get retailers working with us, the faster they can start taking advantage of our delivery services," says Zamora. "Delays in finalizing a sales agreement can result in weeks of lost revenue for Yodel!"

With Adobe Sign, the sales team can generate a variety of sales documents including agreements, trial letters, bond letters, and direct debit mandates from within Salesforce with just a few clicks. Conga Composer automatically determines the type of agreement needed and pulls data directly from the Salesforce customer file, reducing the chance for errors. Minimal training is needed, as the integration between Salesforce and Adobe Sign allows sales representatives to manage the process from a familiar Salesforce interface.

“The combination of Adobe Sign, Salesforce CRM, and Conga Composer gives us a seamless workflow that replaces time-consuming manual labor with automation. Greater accuracy and speed allow us to encourage even greater returns on our Salesforce investment.”

“We shortened the overall sales cycle by 20% using Adobe Sign. Administrators can focus on onboarding new retailers and deliver high levels of customer service instead of chasing paperwork.”

*Edgar Zamora, Salesforce CRM Manager,  
Yodel*

The integration further improves workflows when agreements are signed and returned through Salesforce. Agreements are automatically imported into the Salesforce customer file, and any new or updated information is synchronized.

“Data mapping is a huge benefit of working with Adobe Sign, as it keeps all information accurate and up-to-date with zero effort from our sales staff,” says Zamora. “The combination of Adobe Sign, Salesforce CRM, and Conga Composer gives us a seamless workflow that replaces time-consuming manual labor with automation. Greater accuracy and speed allow us to encourage even greater returns on our Salesforce investment.”

Signing sales agreements is far easier for retailers, who can view and sign them in minutes from any internet browser or mobile device. This simplified process allows them to sign and return contracts much faster—within two days in most cases. “We shortened the overall sales cycle by 20% using Adobe Sign,” says Zamora. “Administrators can now focus on onboarding new retailers and delivering high levels of customer service instead of chasing paperwork.”

### **Communicating with local service centers**

With over 60 sites around the UK, communication between Yodel’s central office and its nationwide network must be top notch. Using Adobe Sign, Yodel creates a document trail on two types of approvals to provide greater accountability and accuracy in communications.

When negotiating with a new retailer, sales representatives first need approval from the local Yodel service center to ensure that it is prepared to handle the increased parcel volume and traffic. Rather than calling the service center, which could sometimes lead to details getting lost, the sales representative now submits an onboarding document describing the opportunity for approval through Adobe Sign.

Once the onboarding document and sales agreement are signed, sales representatives send service centers a first collection notification, which details when retailers want Yodel to start collecting parcels for delivery.

Sending documents for approval through Adobe Sign creates a reliable electronic record of the transaction, including who signed the approval and when. Adobe Sign bridges the gap in the approval workflow by allowing Yodel to secure and record approvals from contacts who may not have a Salesforce license. Once the onboarding and first collection documents are returned, they are automatically imported back into Salesforce, which triggers further workflows, such as changing sales status in the customer file or generating the IT solution for a particular client.

## SOLUTION AT A GLANCE

- Adobe Document Cloud
  - Adobe Sign
- Salesforce CRM
- Conga Composer

“Improving the accuracy and accountability of our internal communications with Yodel service centers has greatly enhanced the customer experience,” says Zamora. “Now we know that everyone is on the same page and in agreement, which leads to better service for retailers. Adobe Sign gives our workflows the boost we need to improve productivity and reduce costs. Our customers are confident in the quality of service from Yodel.”

For more information

<https://acrobat.adobe.com/us/en/sign.html>



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