

Quick Guide: 10 Industries that Use Salesforce Document Automation

It is estimated that over 100,000 companies are currently using document automation in different industries across the world. This figure is steadily growing globally as more businesses discover its huge potential to ease business process and improve service delivery. The best document generation software in Salesforce provides several key benefits to different businesses around the world. The global industry is seeing great advances in the way employees work and the way they interact with customers.

Can Salesforce document generation work for every business? Considering the extensive range of industries that utilize Salesforce, it is clear that most businesses can benefit from automating their document creation process.

Let us take a look at the top 10 industries that are already using document automation for Salesforce and making smart process progress:

#1 Retail



Consider any big retail store, online or physical, and the chances are high they are already using Salesforce. Retailers are constantly trying to personalize the shopping experience for their customers and to improve communication. With the use of artificial intelligence, they are able to create long term partnerships.

When Salesforce document generation is introduced to the mix, your workflow becomes a lot easier, and your business can take automation to the next level!

For example, an online retail shop may have a lot of customer-related data stored in Salesforce. Now they can use document automation to quickly send out a personalized message to a client who recently purchased an item. The sales representative, however, does not need to go through all the customer data to determine what the content of the document will be. With a pre-made template and just the click of a button, the automation software will retrieve specific information like the client's name, their location, what they bought, and related items they may be interested in. A personalized email can then be created and sent to the customer in just a few seconds. With document automation, the right message is sent to the right people at the right time.

In retail, Salesforce document automation is used at different stages of interaction with prospects and customers. For example:

- To create personalized communication to prospects
- Sending special offers to current customers
- Compiling and generating customized invitations and sales report



#2 Business Services

In the business service industry, marketing representatives need to keep the lines of communication with customers open with relevant information. According to research, people are 70% more likely to do business with companies that provide them relevant and accurate information.

Replacing manual proposal writing with automated document generation makes business service companies more successful. The automation software retrieves the most recent data from Salesforce and allows for collaboration between different departments within the business to ensure the proposal is not just accurate but also effective. All the processes of proposal writing can be done in a few minutes and even finalized using an electronic signature.

The business services industry also uses automation for:

- **Sending out special offers**
- **Preparing annual sales reports**
- **Creating proposal documents**

#3 Banking



The banking industry handles a lot of sensitive data that not only has to be kept secure but needs to be used accurately. Furthermore, it is estimated that the cost of manually originating a mortgage loan is about \$7,000. This figure includes a number of manual processes like review, data entry, auditing, and tracking documents.

With such a figure in play, it is imperative that the process of loan document generation is flawless. Automation can help generate loan documentation accurately and at a fraction of the cost that it takes to do manually. Banks can also coordinate with different branches, accessing financial reports and statements from many locations. As a result, they are saving time, money, and making their clients happier.

Examples of how banks can use automation include:

- Preparing customer bank statements
- Generating different documents between the bank and customers
- Creating loan approval and agreement documents



#4 Insurance

The insurance industry is a document-intensive business. The greater part of this business is spent communicating with clients and prospects through emails or providing them policies as a soft or hard copy. This means that a lot of time is spent on documents. **According to estimates, 35 percent or 14 hours of the week are spent looking up information in Salesforce, entering this information into a document, eliminating errors, and other routine tasks involved in creating the perfect document.** This obviously takes a long time and yet the insurance industry depends on being able to serve as many clients as possible.

Insurance companies that are using automated document generation software are cutting down the amount of time they spend on the documents and focusing on the more important, customer-focused tasks. With the click of a button, an insurance policy can be generated, personalized, and sent to the intended policyholder. Above all, the data is accurate.

Some ways insurance agencies use this technology includes:

- Sending automated daily customer responses
- Capturing insurance claims
- Generating insurance policies
- Up-selling using information captured by Salesforce

#5 Technology



Salesforce is such an integral part of the tech industry. Think of social media, the gaming industry, and companies that make gadgets like phones, computers, and TVs. Most software engineers would rather be spending time programming and improving their software and not tediously replying to emails. If you think of Facebook that has over 1 billion active users, there is obviously a challenge in communicating to all these people individually and yet everyone will receive personalized communication from the company, say on their birthday or a memory from their posts.

Document automation enables personalized interaction between tech companies and their clients. They are even able to schedule updates, notifications about upgrades, as well as respond to inquiries.

Other ways the tech industry uses document automation includes:

- Create effective customer response systems
- Generate paperless receipts at lightning speed



#6 Manufacturing

The demand for more efficient ways of doing things in the manufacturing industry has driven industry leaders to adopt document automation in Salesforce to ensure they can work faster with less manual input. A typical manufacturing firm that has a lot of business will face a challenge like having to invoice all its customers as well as receiving and managing orders. **Research shows that some of the biggest manufacturers can receive as many as 10,000 orders a day and all this needs to be captured, verified, authorized, and so on. With a manual system, you may need about 50 people to handle the process.**

Automation makes it possible for a customer to quickly make an order online. Salesforce will then record this order and automatically generate a purchase order. The different concerned departments will receive notification and manufacturing will begin once the purchase has been authorized. After delivery, an invoice will be generated for the client. This can be done for thousands of orders and it will be accurate and quick.

Document automation in Salesforce is used for:

- Taking field orders
- Compiling manufacture process documents
- Compiling and generating customer feedback on the product

#7 Tourism



The travel industry today is becoming a personalized experience thanks to document automation in Salesforce. If you have planned and booked travel online, then you probably have seen how this industry is employing document automation. Right from the inquiry stage where the traveller finds out rates and possible destinations, document automation is already in action.

An airline may receive millions of people booking and inquiring about travel to different destinations. It would be an impossible or extremely expensive process if all these people had to make bookings manually, but instead, they can go online and do all that they want and even receive the boarding pass via email. The same can be done for hotel bookings and payments as well as tours.

Tour agents are also able to send personalized vacation deals to customers as well as people who may have made inquiries in the past. All this makes it easier to travel and to serve the clients.

- Examples of ways in which it is used include:
- Generate boarding passes for airline clients
- Create customized bookings
- Compiling travel data

A close-up photograph of several blue microscope lenses, showing their intricate details and the text 'MC PLAN S 10X/22' on one of them. The lenses are arranged in a circular pattern, with the foreground lens being the most prominent.

#8 Healthcare

Healthcare can be a balancing act. There is the pressure to adhere to strict guidelines, provide good health services, and manage risks. All this is going to require sufficient documentation, but the challenge is how do you do all that and then also focus on providing excellent care? With the manual health care document process, as much as 20 percent of health records go missing and some may not capture the right information. There is no room for such error when it comes to health and that is why many in the health industry are switching to document automation.

With Salesforce providing the data, health providers can access different documents concerning their clients. It could be a pharmacy finding recording patients' interactions with their medicines to see a common trend or a doctor keeping track of the progress of a patient. All this is accessed with ease and can be shared among other concerned parties. A doctor in one continent can share medical test results with a specialist on another continent and this is done in an instant.

Health care professionals utilize document automation for the following:

- Capturing and sharing patients' medical records
- Making orders for medication
- Generating research documents

#9 Communications



Communication and media are a constant in our daily lives, and this means the industry is increasingly under pressure to deliver with flawless precision. This would be a daunting challenge with manual document generation. Carrying out surveys and then interpreting the data, for example, is going to be a long process that may even fail to capture data accurately.

With document automation in Salesforce, it is a much simpler task. If for example, a television station would like to know how many viewers they have at different times of the day, they do not need to go from door to door with questionnaires, this is data that can be captured online and with a simple click the station would have exact numbers and graphs that they can then share with advertisers.

Another document can be generated to show what people are saying about a particular program, and all these views can be collected from different sources including social media and online discussion forums. There is no need for an individual to visit each and every site to get this information.

Media and communication industry professionals use document automation in the following ways:

- Increasing interaction with audiences
- Understanding the preferences of their audiences
- Collecting important data that can be shared with advertisers
- Identify new market opportunities

#10 Government



There is an ever-increasing workload demand in government sectors, meaning a lot of paperwork. Many employees in this industry spend as much as 60 percent of their time on paperwork. This means instead of working for their constituents, they are filling documents, editing them, compiling and entering data, as well as going through a bureaucratic process of getting documents approved.

This industry is turning to document automation in Salesforce to free up more time so they can concentrate on service delivery. For example, complaints made through an online portal can be captured and categorized according to their associated department. Frequent complaints about the same issue can be forwarded to the relevant office for action, while those that have easy solutions are dealt with immediately using the automatic documentation system. This is just one of the many ways that government utilizes automated documents in Salesforce.

Other ways include:

- Ensuring consistency in documents
- Creating legal documents
- Handling proposals
- Managing recruitment documents

These are the top 10 industries according to recent research using document automation in Salesforce, but there are many more that are increasingly relying on it. Now is the right time to see how your industry can benefit from it.

Learn more at www.windwardstudios.com.