

# EchoSign Contract Management Service



## Product Summary

*EchoSign Contract Management Services* is a contract signature system with complete, seamless integration to Salesforce.

## Application Review

*EchoSign Contract Management Service for AppExchange* is a contract signature system that integrates with Salesforce. We found the application makes proposal documentation easy, and liked that it provides real-time visibility into every contract out for signature from within Salesforce.

In tests of *EchoSign Contract Management Service*, we were able to send contracts directly from within Salesforce. The status of the agreement is then automatically updated as 'Out for Signature.' Once the customer signs the contract, the status changes to 'Viewed by Customer.' Customers can choose between e-signatures and fax signatures.

After a customer signs a contract, that contract is automatically uploaded onto the customer's account. The application updates the record and sends an acknowledgment to all parties involved--indicating deal closure. A copy of the final contract is then sent to user and customer. We were also

able to view contract history within Salesforce, a feature that will allow sales teams to deliver accurate forecasts and decrease post-sale administration.

## Key Strengths

*EchoSign Contract Management Service* provides an e-signature feature. This differentiates it from other applications and from Salesforce.com.

The status upgrade feature of the application enables users to analyze a deal's specifics.

The virtual fax system simplifies the task of sending sales contracts to customers. Furthermore, it speeds up the sales cycle and automates communication with the customer.

## Areas for Improvement

*EchoSign Contract Management Service* could be enhanced by the addition of an alert for tracking deal renewals.

## Company Background

Based in Palo Alto, Calif., EchoSign provides Web-based tools for document management and delivery. It is funded by Storm Ventures. Cisco, Brooks-Eckerd, and Network General are EchoSign customers.

## Keywords

- Document tracking system
- Contract management system
- Agreement management
- Document management
- Contract signature system
- Document administration
- Contract administration
- Deals management

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## Rating Scale

The application has been rated based on its business impact, innovativeness, ease of implementation, ease of use and value for money. This rating scale takes this into account and rankings are as follows:

**5/5** meets or exceeds the need identified by the creators

**4/5** meets much of the identified need but a future release will encompass a more robust solution

**3/5** meets some of the need identified additional build-out is required

**2/5** an interesting application but without broad applicability

**1/5** fails to run cleanly

## About Infiniti Research

Infiniti Research is a full service business intelligence and market research firm. We produce tailored research to enable our clients to take strategic and tactical decisions.

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