



DemandBlue helped client achieve process efficiency by **integrating Ironclad's contract management application with Salesforce.**

About the Client

The client provides a reliable energy investment platform that originates clean energy projects on behalf of its investors. Its mission is to accelerate clean energy through simpler finance.

Solution

- Performed Discovery to understand the various use cases and business processes to be addressed by the new system.
- Installed Ironclad Managed Package in Salesforce to create, automate, and manage contract workflows seamlessly.
- Linked Salesforce account with Ironclad to setup Workflow.

Benefits

- ✓ Automation of contract workflows enabled the client to boost process efficiency and eliminating manual time and effort required in keying and re-keying information between systems.
- ✓ Availability of accurate information across systems, eliminating duplicate data entries.
- ✓ Automation of complex CRM workflows, streamlining of activities, and improvement of process visibility in real-time.