

ABC Fitness Solutions

Client Success Story

Automated Workflows Enable Rapid Contract Generation

ABC Fitness Solutions (ABC Financial) delivers cutting-edge billing and health club management software to the fitness industry, maximizing revenue throughout the clubs they serve. They offer comprehensive billing services, advanced club management software, customized marketing programs and customer service.

Challenge

ABC Financial supports operations in 6,700 health clubs and gyms all across United States, Puerto Rico, Canada, Mexico, and Europe. But along with growth come challenges. The organization was signing up new customers for their various services successfully, but the contract preparation and new customer on-boarding process was inefficient and time-consuming.

The contract documents were highly variable, with 150 to 200 different data fields that were populated by hand. The workflow required salespeople to enter the same information twice – once into the documents and then again into ABC Financial's Microsoft Dynamics CRM system. Plus, a great many of ABC Financial customers operate multiple facilities. Location-specific data and contract clauses had to be manually added to the documents for every new deal to account for these multi-site customers.

Because the new customer on-boarding process was dependent upon static documents, obsolescence was also an issue. Ensuring

CLIENT

ABC Fitness Solutions

PARTNER

Experlogix

PRODUCTS

Microsoft Dynamics 365

BENEFITS

- Improved document consistency
- Accelerated document processes
- Increased business growth

COUNTRY

United States



that all salespeople were using the most current version of the contracts was difficult and making global changes to contract language was a time-consuming task. Revisions and changes to the “standard” documents were typical – with ABC Financial handling on average 50–60 document revisions per day. Many people in the organization were involved in creating, proofing, and revising contract documents, including an administrator working full-time on managing the workflow.

After being introduced to the company at a Microsoft Dynamics CRM conference, ABC Financial began talking with Experlogix Document Automation about replacing their existing workflow with one that was based on the Experlogix technology.

Solution

End-to-end Automated Workflows

Experlogix analyzed the variety of contract documents in use at ABC Financial and was able to rationalize the template library from 20 templates to three. Revisions and changes to these templates can be done and released in a fraction of the time it used to take, ensuring that sales representatives always present the most current, compliant versions of documents to their customers.

Experlogix’s seamless integration with Microsoft Dynamics CRM addressed the cumbersome and manual practice of entering data twice, enabling ABC Financial salespeople to spend more time on productive tasks, such as making sales calls. But the workflow improvements didn’t end with integrating the contract documents with the data source. By analyzing the CRM data, Experlogix Document Automation triggers additional processes based on the business rules set up for individual situations. These processes include the gathering and storage of secure electronic signatures via integration with AssureSign.

From contract generation to delivery and electronic signature, the entire new customer on-boarding process is now automated for ABC Financial.

Extending Functionality

ABC Financial had a desire to automate follow-up actions that would be triggered by data collected from their customers during the signature process. The Experlogix team captured the company’s requirements and was able to rapidly extend the functionality of the Experlogix Document Automation solution to their customer’s satisfaction; the enhanced functionality was delivered within a matter of weeks, and the complete solution was still delivered and implemented on time.



The flexibility and customization built into the product design are what allows Experlogix Document Automation to fulfill the unique requirements of their customers, even in a niche industry such as health club management software.

Result

The rationalization of ABC Financial's template library generated immediate benefits by reducing maintenance and improving consistency. The risk of using a non-compliant template – and having to start over after a transaction was in process – was also eliminated.

The Experlogix Document Automation solution integrated with Microsoft Dynamics CRM provided ABC Financial salespeople with powerful capabilities for data integration; personalized contracts can be generated in seconds with accurate customer data pulled from ABC Financial's CRM system. The end-to-end automated workflows boosted productivity, freeing the sales team to concentrate on growing the business instead of struggling with a cumbersome and manual contract process.

The excellence in service – quality, timing and delivery of requirements – received from the Experlogix team was particularly noteworthy to ABC Financial. Knowing they had a vendor-partner with a similar philosophy of customer service gave them the confidence to consider further applications across the organization.

Want to learn more?
Speak with one of our experts.

Get Started

“Generating a single contract used to take us over an hour. It is now a ten-second task. All we have to do is literally click a button.”

Kyle Childers
Director of Technical Sales



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