

## Meritage Homes Automates 98 Percent of Sales Contract Process with Drawloop

### Challenge

Prior to 2011, if you asked a sales associate at Meritage Homes what was more challenging - selling a new home or creating the contract, most would probably say the latter. Each contract is comprised of multiple legal documents and addendums that are manually compiled and edited. This easily added up to a 60-to-100 page document. Each contract was also division -and state- specific, and over time, this led to thousands of versions. If a sales associate left out one required document or made an error, the entire contract was null and void and delayed reporting of the sale.

### Solution

In 2011, Meritage overhauled its internal systems, deploying Salesforce nationwide and also creating a customized sales and contracting database that accounted for every part of the homebuilding process. Realizing the opportunity to leverage this database and automate its contracting process, Meritage selected Drawloop's LOOP Document Services to integrate with the new database and Salesforce. By using Drawloop, Meritage endeavored to gain control of its documents and create a more efficient sales contracting process.

### Results

The combination of Salesforce, the custom sales and contracting database, and LOOP Document Services has been revolutionary for Meritage Homes.

- Meritage reduced the number of documents used to create a sales contract to fewer than 500 from 3,400
- Meritage reduced Contract support issues to virtually zero and no longer requires a dedicated headcount for tracking, managing and creating sales documents
- Legal now has control over any document that requires a customer signature, which has eliminated ambiguity and the risk of errors once a contract has been completed and signed
- A staggering 98 percent of the custom or customer-specific fields in a sales contract are now dynamically populated vs. manually edited

## Writing the Book on New Home Sales Contracts - Literally



To say that a new home sales contract is complex is an understatement. One contract accounts for every single detail of a new home - from the configuration of the lot to hundreds of exterior and interior options to the broker or real estate agent addendums. A single contract can easily be 100 pages - the size of a small book.

In 2010, Meritage Homes was using a niche CRM system and archaic contracting solution to create contracts. The solution was not flexible and included a homegrown document creation tool that forced them to use only the custom templates provided vs. working with standard formats like Word, Excel, PowerPoint, and PDF.



### Industry:

Real Estate & Construction

### DDP Use Cases:

Contracts, Legal T&Cs,  
Customized Builder Specs,  
Custom Addendums

### Company Overview:

Meritage Homes is the ninth largest homebuilder in the United States. In 2013, Meritage received the U.S. Environmental Protection Agency's ENERGY STAR Partner of the Year of Sustained Excellence Award, for its innovation and industry leadership in energy-efficient homebuilding. Meritage also was the first national homebuilder to be 100 percent ENERGY STAR® qualified in every home it builds, and far exceeds ENERGY STAR standards today.

***"Our legal team now knows that signed contracts will come in legally binding and our support team has almost zero contracting issues related to the documents in sales contracts."***

### Steve Thompson,

Principal Applications System Specialist for Meritage Homes

While sales associates generated the contracts, legal “owned” any document that had a customer signature. The challenge, however, was that half of every contract - including the documents compiled and the content they contained - was manually edited. One new edit meant one new contract and this literally led to thousands of different document versions. Managing the contracts was so challenging that Meritage dedicated a support person just to track the sales documents.

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“Management and Legal arduously combed over the sales contracts prior to the establishment of a standard process with Drawloop,” said Steve Thompson, Principal Applications System Specialist for Meritage Homes. “It’s not that our sales associates intentionally made mistakes, it’s that the margin of error with the old process provided too much ambiguity as well as the ability to easily and unintentionally leave contractual items unaddressed.”

### **Taking Control of Their Sales Process & Contracts**

In 2010, Meritage began streamlining its internal systems. The company selected and deployed Salesforce’s CRM solution across its 11 divisions nationwide. Simultaneously, Meritage created a homegrown sales and contracting database to account for every data point as it pertained to a new home – the community, lot configuration, options, buyer and escrow tracking, and even the agents or broker details.

With a clear vision of the business requirements, Meritage set out to find a document automation solution that gave control back to legal, provided flexibility on document formats and could integrate with Salesforce. LOOP Document Services met all of their requirements and also provided out-of-the box integration with Salesforce.

In 2011, after a six-month comprehensive integration project that included developing custom objects for Salesforce, as well as custom workflows and integration with back office accounting systems, the impact on Meritage’s sales process was felt almost immediately, especially as it pertained to creating sales contracts.

With Drawloop automating the contract process, legal now had 100 percent control over all sales documents and what could or could not be edited. Sales associates now simply choose the correct sales contract or DDP in Salesforce and the data is automatically pulled and populated.

The biggest impact, however, was the reduction in the total number of sales documents that legal now has to manage. Prior to Drawloop, Meritage had more than 3,400 different documents that were used to create a sales contract – every division had a different spin and then there were even multiple versions within a division. Now there are fewer than 500 total documents and these have been combined into just 34 different DDPs.

Other highlights include:

- Both the look and feel and content in sales contracts are now consistent across all Meritage Homes divisions presenting a more professional and polished image
- Support issues for sales contracts have been nearly eliminated, and if one does arise, it’s usually data not document related
- Editing across hundreds of documents is now scalable and takes a fraction of the time it used to – days vs. months
- Legal can utilize any document format or combination of documents – Word, PPT, Excel and/or PDF – to create a sales contract package
- A staggering 98 percent of the custom or customer-specific fields in a sales contract are now dynamically populated vs. manually edited

“The best way to describe our sales contract process with Drawloop is ‘set it and forget it,’” said Steve Thompson. “Our legal team now knows that signed contracts will come in legally binding and our support team has almost zero contract issues related to the documents in sales contracts.”



### **What is a DDP™?**

A Dynamic Document Package (DDP) is the tangible output of LOOP Document Services and the end deliverable sent to anyone at anytime. A DDP is a single packaged asset comprised of one or more different document types - Word, Excel, PowerPoint or PDF - that are dynamically merged with Salesforce data. The set of documents are the same native ones currently used during the sales or service process, except now they reside in Salesforce.

### **About Drawloop**

Drawloop fundamentally changes the way documents are created during the sales and service process by allowing you to dynamically merge any Salesforce data into any combination of document templates (Word, Excel, PPT, PDF, etc), via a Dynamic Document Package (DDP). By creating and managing all of your sales and service documents in Salesforce, you eliminate manual processes, increase accuracy and compliance, while still leveraging existing business logic and workflow rules.



**For more information**

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