



CASE STUDY

One-Click to Contracts – E-Signature Automation with DocumentsCorePack



ABOUT

HRK LUNIS AG is a leading independent asset manager in the German-speaking region, managing over €6.6 billion (as of Dec 2024). With offices across Germany and a team of 100+ employees, including 19 in-house analysts, the firm provides personalized, responsible investment advice.



www.hrklunis.de



100+ employees



Finance, Asset Management



CHALLENGES

With form-heavy processes being part of daily business, HRK LUNIS managed documents manually in Microsoft Word, requiring employees to **enter customer information into forms and then re-enter the same data into the CRM system**. This two-step process not only caused **frequent disruptions** and **increased the risk of errors**, but also consumed a considerable amount of time and resources - slowing down internal workflows and reducing overall efficiency.



SOLUTION

With the introduction of DocumentsCorePack (DCP), HRK LUNIS was able to **fully digitize its document workflows** - from creation to signature. A key requirement was the ability to **send documents directly from Dynamics 365 to DocuSign via DCP**. This eliminated the need for manual exports, email attachments, or switching between systems.

01 ▶ Streamlined E-Signature Processes



Documents can now be generated in Dynamics 365 with a **single click**, **automatically** pre-filled with CRM data, and sent directly to **DocuSign** for electronic signature. The use of Advanced Signatures ensures **legal compliance** and meets regulatory requirements.



02▶ All in One Flow



Once signed, documents are automatically saved to the relevant record, ensuring a **secure and fully traceable process**. Complex documents can be created, digitally signed, and stored in the correct SharePoint location - all directly within Dynamics 365. This seamless automation saves time and paper while **significantly improving efficiency, accuracy, and traceability**.



CONCLUSION

By implementing DocumentsCorePack, HRK LUNIS has **successfully automated and streamlined its entire document lifecycle** within Dynamics 365. The elimination of manual data entry and the seamless integration with DocuSign have not only accelerated workflows but also **improved data accuracy and compliance**. This solution saves valuable time and resources while enhancing traceability and security - empowering HRK LUNIS to focus more on their core business and less on administrative tasks.

Are you ready to revolutionize the way you handle your documents too?



START YOUR 14-DAYS FREE TRIAL!

All features and support included



“ Implementing DocumentsCorePack together with DocuSign has greatly enhanced our internal document workflows. It enables us to efficiently generate complex documents, seamlessly apply digital signatures, and systematically organize our files. This solution plays a key role in advancing the digital transformation of our operations. ”

Luca Altmannsberger, IT-Manager

