How GlobalSign Helped USAFact Secure and Streamline the Contract Signing Process for Service Experts' Field Sales Reps and Customers

Challenge

Heating, air conditioning, and plumbing provider Service Experts recently launched their Advantage Program, a new offering designed to simplify the customer experience by bundling multiple services under one low monthly payment. As part of the program, sales representatives in the field require the ability to quickly create customized Advantage contracts while on-site in customers' homes. Paper contracts are tedious and do not allow the kind of customization necessary to support this new level of service. Service Experts worked with their ongoing security partner, USAFact, to develop a web application that walked the sales reps through the different calculations, allowing them to enter information as necessary before creating a PDF that could be electronically signed and locked down.

They soon realized they would need the involvement of a certificate authority (CA) that was Adobe Approved Trust List (AATL) verified, thus delivering a consistent, trustworthy experience that Service Experts' customers could depend on and sales reps could easily administer.

Solution Requirements

- Allow Service Experts and USAFact to maintain control over the contract signing process in the field

- Enable sales representatives to customize contracts, calculate rates quickly and accurately, and apply taxes and other street-level fees as needed

- Collect secure signatures that can be referenced and verified at a later date

- Provide authenticated, legal digital contracts to customers, local offices, and the centralized team immediately upon finalization

CUSTOMER PROFILE

- **INDUSTRY**
  Background Screening

- **GLOBALSIGN SOLUTION**
  Digital Signing Service (DSS)

AT A GLANCE

- **PROBLEM**
  USAFact needed a way to collect secure digital signatures for its client, Service Experts, without adding steps to the contract process or disrupting the customer experience.

- **SOLUTION**
  GlobalSign's digital signing service enabled USAFact to strengthen document security while maintaining control over how signed contract PDFs were being created, updated, and distributed.

Solution

As a member of Adobe's Approved Trust List (AATL), GlobalSign was the clear winner when it came to USAFact's search for a digital signature service provider. Now every time a Service Experts contract is signed using GlobalSign's digital signing service technology, Adobe will trace the certificate back to GlobalSign and confirm that it is indeed trusted. Service Experts is able to provide its customers with a positive and efficient contract signing experience, while also ensuring the future validity and integrity of the information being collected on-site by sales representatives. In addition, GlobalSign's expert sales engineers enabled USAFact to seamlessly integrate GlobalSign technology into their existing web application and intake workflow.

With GlobalSign's cloud-based digital signing service (DSS), you get everything you need to deploy digital signatures with one simple REST API integration! All supporting cryptographic components, including signing certificates, key management, timestamping server, and OCSP or CRL service, are provided in one API call with minimal development and no on-premise hardware to manage.

"Working with GlobalSign has been great. The sales process was smooth and straightforward, the technical support has been phenomenal, and the GlobalSign digital signing solution will easily scale as our business continues to grow." – Amanda Wilson, Product Manager, Service Experts

Results

- GlobalSign worked directly with USAFact developers to create and deploy a customized digital signing solution in under four months

- Upon completion of the initial pilot program, Service Experts plans to roll out the digital signature service to its 90 U.S. locations, to be used by around 600 service representatives in the field

- Service Experts and its customers can rest assured that any information collected will remain valid and secure, now and into the future

"One of the things I found very helpful, as a developer, was the technical support that we got with GlobalSign. They gave us the flexibility and control we needed so that we could create a seamless and efficient experience for field representatives and customers, while still being able to provide a trusted digital signature on each and every contract."

- Michael Fabry, Senior Developer/IT Manager, USAFact

About USAFact

For nearly 40 years, USAFact has been at the forefront of the background screening industry. Their pre-employment and post-employment screening services combine the latest Internet technologies with an experienced professional staff to deliver a proven resource to thousands of clients. Offering a variety of screening services and packages for businesses sized from global Fortune 100 companies, to small, not-for profits, and every size in between, USAFact provides services custom-tailored to our individual clients' needs.

About Service Experts

Service Experts has 94 service locations in cities across the North America, providing heating repair, air conditioning repair, and indoor air quality sales, HVAC installation, maintenance, and repair service for both the residential and commercial HVAC market. Service Experts HVAC technicians are highly-qualified, NATE-certified HVAC experts, and plumbers are licensed to sell and repair all types of water heaters, disposals, pipes and plumbing equipment.

About GlobalSign

GlobalSign is the leading provider of trusted identity and security solutions enabling businesses, large enterprises, cloud service providers and IoT innovators around the world to secure online communications, manage millions of verified digital identities and automate authentication and encryption. Its high-scale Public Key Infrastructure (PKI) and identity solutions support the billions of services, devices, people and things comprising the Internet of Everything (IoE).

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