

# From dotted line to bottom line.

Remove friction from sales processes with e-signatures and automated workflows.



# Sign with the times: Digital documents boost sales.

The modern sales environment is undergoing a full-scale remodel. It wasn't long ago that a constant stream of paper contracts, rows of filing cabinets, and stacks of documentation and hard copies were the norm. As the need to streamline and digitize every aspect of modern business operations increases, companies are phasing out those bulky, ineffective systems.

But decluttering is just a fortunate side effect of the digital revolution: **Advances in digital documentation can create real revenue gains for businesses.** While companies can expect to recover hard costs by eliminating physical paper trails, the real value lies in harnessing workflow efficiency.

The major inefficiencies facing today's sales teams are:

- Excessive closing times due to long email chains, manually routed documents, or rounds of "phone tag"
- Delays caused by legal or technical compliance approvals
- Lost time spent fixing human errors
- Distractions caused by inefficient paper-based workflows

While switching from paper to digital document management can alleviate all of these friction points, truly automated workflow solutions need to be adaptable to the unique needs of individual businesses. Of all the digital document tools available, industry leaders are turning to e-signature capabilities first and foremost when building their buying and selling toolkits.

Why? Because the greatest advantage for any sales team is the opportunity for a more fluid customer sales cycle—one that simplifies and improves customer experience while enabling hassle-free closing. And that all starts with electronic document signing.

Let's break down how digital document processing can remove the restrictions that are holding back your sales team.



# Help crossing the finish line: E-signatures assist in your final push to close the sale.

Experienced sellers know it well: the excruciating wait while prospects review, reroute, and sign contracts and agreements. In one CSO study, 45% of sales managers said that on average, it takes more than seven days to get buyers to sign off on contracts; and another 30% said it takes more than a month.<sup>1</sup> That's a long, vulnerable period for any closing.

The right e-signature platform can speed up this process. For example, Adobe Sign provides its users with a significant reduction in signature cycle time.<sup>2</sup> By making the closing journey predictable and seamless, Adobe Sign helps sales representatives reduce the time it takes to [sign documents](#) like quotes, nondisclosure agreements (NDAs), and approvals. In fact, recent research by Forrester Consulting shows that customers using Adobe Sign had 28 times faster signature cycles.

E-signatures also save time for your team members. The same report credited Adobe Sign with saving 1.5 hours per transaction by reducing manual signature steps. Those savings add up.

Flexibility and adaptability are also key, especially when multiple parties are required to provide input before closing. With Adobe Sign, all stakeholders can receive an alert to sign off immediately—which they can do wherever they are, on whatever device is nearest.

Adobe Sign is compatible with any device with a browser, and it integrates with most business productivity software, including Microsoft Dynamics 365 and Microsoft 365.

In short, choosing the right e-signature platform can:

- Streamline, digitize, and automate your sales team's workflow
- Improve your customer experience and time to close
- Enhance your bottom-line results
- Reduce legal and compliance risks

<sup>1</sup> "Optimizing the Quote to Close Process," J. Dickie & B. Traylor, 2015.

<sup>2</sup> "[The Total Economic Impact of Adobe Sign](#)," a commissioned study conducted by Forrester Consulting on behalf of Adobe, September 2019.





# Better by design: Integrate your e-signature platform into your current sales tools.

Businesses without e-signatures experience gaps in automation that negatively impact their customers' experiences. Implementing an e-signature solution can [help sales teams](#), but the right e-signature solution delivers more than just signing capabilities.

The full value of digital document workflows can only come from a fully integrated e-signature solution.

Adobe Sign is uniquely and deeply integrated into the business solutions your sales teams use every day. Adobe Sign is Microsoft's preferred e-signature solution.

Adobe Sign not only provides its own set of benefits for businesses, it also unlocks the full potential of your existing CRM solution, especially for teams using Microsoft Dynamics 365. By coupling Dynamics 365 and Adobe Sign, you can send, track, and sign documents without ever leaving the Dynamics environment.

This isn't just a convenience—it saves time and boosts productivity and revenue. Digitizing, automating, and integrating signing processes gives sales teams more time and energy to drive businesses forward.

But on top of providing a secure, simple, and seamless platform for closing deals, e-signatures can do even more to transform businesses.



# Beyond the dotted line: It's bigger than sign and send.

E-signature capabilities can drastically improve how well businesses function. It might sound dramatic, but there's far more to e-signature solutions than just putting a virtual pen to virtual paper. Industry leaders are using Adobe Sign to:

## **Tailor and automate document workflows.**

While this includes electronic signatures, Adobe Sign can also collect form data, automatically reroute signed documentation, confirm delivery of important documents, and move business ahead in as few steps as possible.

## **Assign roles to stakeholders.**

This might include the signer, approver, acceptor, form filler, certified recipient, and delegator. This clarity decreases complexity and promotes accountability, which drives individuals to better serve the sales process.

## **Route to recipients in a specific order.**

Eliminate double handling and emails by automating the document workflow from the outset.

## **Invite multiple participants with a single request.**

Integrate your Dynamics 365 contact database directly into your Adobe Sign recipient list to create an organized workspace with your important contacts.

## **Enable anyone from a group to sign or respond.**

Get full transparency within a group, so everyone can view, sign, or send documents for signature.

## **Set up reminders and notifications.**

Help your sales teams stay on track, so they won't miss deadlines or forget to complete action items.

## **Create reusable templates for your teams.**

Eliminate common mistakes and ensure consistent, error-free results with easy-to-create, reusable workflow templates.



# This is your business on Adobe Sign.

What would it mean for your company if you could inject the power of Adobe Sign into your next account plan—before it even gets underway? Imagine how much easier kick-off would be if you could:

- Specify which documents need to be included in an agreement
- Prefill vital information fields
- Add agreement expiration dates and password/security options
- Provide instructions for customers

Adobe Sign helps ensure you have a [best-practices workflow](#). With self-serve documents, you can provide customers, partners, and employees with a preset document workflow as they kick off new business initiatives.



## Your initial workflow might include:

### 1. Creating a new process.

Arrange HTML forms to prequalify requests, and assign the right form or document package to each situation.

### 2. Establishing next steps.

Use conditional logic to route each request correctly, so documents move automatically from one task to the next.

### 3. Monitoring (or taking) action.

Route tasks to the right people automatically. Digitally assemble, review, approve, sign, and deliver documents—and more.

### 4. Using dashboards.

Manage signed and received documents, generate reports, and get real-time visibility into all your document cycles.

When choosing an e-signature solution, also keep in mind that Adobe Sign leverages Adobe's scale and experience to offer far greater benefits than your basic e-signature application, including:

- A robust, enterprise-level security framework
- A simple drag-and-drop interface
- Email templates
- Password management and performance reporting
- Multifactor authentication
- In-depth user-management features

## Digital workflow = dramatic profitability.

1. By integrating digital document management, businesses typically see:

**36% increase** in revenue

**30% reduction** in overall document management costs

**65% opportunity** for lowered customer acquisition costs

2. Business leaders agree:

**77% say that a better document workflow** improves customer experience

3. Sales teams agree:

**94% of e-signature** users report an increased ability to identify the most profitable buyer profiles, customers, and accounts

4. The numbers agree:

By integrating electronic and digital signatures, organizations achieve up to **3.8 times their ROI**<sup>3</sup>

## Money talks.

While the operational benefits of digital document workflows are vital to progressive businesses, the customer service and hard-cost benefits can't be overlooked.

Recently, Forrester Research conducted an economic impact study of Adobe Sign.<sup>4</sup> It examined the implementation of Adobe Sign over a broad spectrum of organizations—all with unique digital transformation needs. The companies Forrester surveyed reported the following average impacts over three years:

**420%**

ROI

**1.5 hrs**

and **US\$6 saved** per signature transaction

**2 hrs**

employee hours saved per form

**US\$5.5M**

three-year savings over prior tools, compliance, and hard costs

<sup>3</sup> "E-signature & Sales Operations: A Catalyst for Competitive Improvement," Andrew Moravick, Aberdeen Research, October 2017.

<sup>4</sup> "The Total Economic Impact of Adobe Sign," a commissioned study conducted by Forrester Consulting on behalf of Adobe, September 2019.



## CASE STUDY

### Hitachi Solutions



# Accelerating service delivery with Adobe Sign + Microsoft Dynamics.

**Hitachi Solutions Europe Ltd.**

**Based: London, United Kingdom**

**Employees: 3,000 (Dynamics Solution Group)**

Hitachi Solutions is one of the world's largest consulting firms specializing in Microsoft and Adobe solutions—particularly Microsoft Dynamics and Adobe Sign. From major global enterprises to small local organizations, Hitachi Solutions helps customers transform their businesses through Microsoft and Adobe's range of applications, while offering best practices and industry know-how from its growing team of specialists.

## Situation

Like many of its customers, Hitachi Solutions was balancing accelerated company growth with evolution in business technology. During a period of organic growth and acquisition that saw its personnel increase tenfold, it was important for Hitachi Solutions to ensure that its own processes remained optimized to support customers' needs.

## Challenge

One area that Hitachi Solutions identified for process improvements was document workflow. In particular, sales contract management.

Traditionally, teams used paper-based workflows for all customer agreements, sending multiple copies of paper documents for customers to sign, copy, and return by post. As a result, time spent waiting for signatures delayed customer engagement—meaning customers would wait longer to benefit from technological efficiencies, while Hitachi Solutions would lose revenue by missing out on billable hours.

Handling paper workflows also made it difficult to demonstrate compliance with the General Data Protection Regulation (GDPR), a European Union regulation, and created challenges for auditors from Hitachi Solutions headquarters in Japan.

## Solution

After seeing its customers benefit from digital document workflows, Hitachi Solutions realized that it also needed to harness Adobe Sign and Microsoft Dynamics integration to improve its own processes. By fully digitizing contract and agreement workflows, Hitachi Solutions now creates and sends contracts, agreements, and other documents with a single click in Dynamics 365, while taking advantage of the secure digital signature and traceability features in Adobe Sign.

“With support from Adobe, we were able to get our internal implementation of Adobe Sign integrated with Microsoft Dynamics 365 up and running in just a week,” says Kyle Hill, a former Dynamics 365 pre-sales solution architect at Hitachi Solutions.



## CASE STUDY, CONTINUED

### Results

#### *Created a single source of customer information.*

A single digital location for all customer documents gives sales, customer support, and consulting staff access to the same source of customer information. Staff can even view documents while working with customers in the field, quickly pulling up documents on their mobile devices.

#### *Increased billable hours by accelerating contract workflows.*

When staff need to create a document, they simply open the Microsoft Dynamics 365 customer record and create relevant documentation with a single click. With one more click, staff can then send the document for signature through Adobe Sign.

Customers can view, sign, and return documents from any device, reducing the turnaround time for document signatures from more than 10 working days to 2.

#### *Gained efficient and compliant customer services.*

In addition to helping customers get started with services faster, working with the Adobe Sign and Microsoft Dynamics 365 workflow improves customer experience. Customers no longer need to look through contracts in triplicate to find where to sign. They also don't need to worry about rushing to the post office when they're done signing.

Customers can also feel reassured that the processes are compliant with regulations and internal standards. Adobe Sign records information about who signed the document, when they signed the document, and other necessary data to provide a clear audit record for each signature. Having this record of data improves auditability and helps ensure corporate compliance requirements from Hitachi Solutions headquarters in Japan.

*"Our customers are getting a much more efficient, auditable, and professional experience than they did before, thanks to the integrations between Microsoft Dynamics 365 and Adobe Sign."*

#### **Simon Drake**

Senior vice president and UK general manager,  
Hitachi Solutions Europe, Ltd.



# Hitachi Solutions

After deploying Microsoft Dynamics 365 + Adobe Sign integration, the company achieved:

**80%**

reduction in contract  
turnaround times

**50%**

cut in processing times

**+hrs**

more billable hours  
through accelerated  
contract finalization

**Full**

compliance and auditability  
with contract tracking  
and management





# Adobe × Microsoft: Partnering to accelerate your digital transformation.

Adobe and Microsoft are committed to helping organizations with their digital transformation. Our combined solutions drive business efficiencies and deliver end-to-end digital experiences for millions of users around the world.

Find out more about how we can help your organization take the next step in its digital transformation journey.

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