

Accelerating service delivery.

Hitachi Solutions helps itself and its customers improve business efficiency with digital workflows through Microsoft Dynamics 365 and Adobe Sign.

Hitachi Solutions

"The integration between Adobe Sign and Microsoft Dynamics 365 ultimately benefits our bottom line by allowing us to complete contracts faster so staff can start working on client projects much sooner!"

Simon Drake, Senior Vice President and UK General Manager, Hitachi Solutions Europe, Ltd.

SOLUTION

Adobe Sign, an Adobe Document Cloud solution

Microsoft Dynamics 365

RESULTS

80% **REDUCTION** in contract **TURNAROUND TIME** helps customers get started with services faster



Delivers **MORE BILLABLE HOURS** to improve the bottom line by accelerating contract finalization

50% **LESS TIME** spent processing paperwork using **MICROSOFT DYNAMICS 365 INTEGRATION** and automated workflows



Maintains **COMPLIANCE** and auditability with better contract tracking and management



Hitachi Solutions Europe, Ltd.

Established in 1970

Employees: 3,000 (Dynamics Solution Group)

London, United Kingdom

www.hitachi-solutions.co.uk

CHALLENGES

- Provide better customer service with faster startup times and smoother customer service transitions
- Improve ability to comply with audits and regulations related to information such as the General Data Protection Regulation
- Reduce the time and labor involved in creating and managing agreements

USE CASES

- Digital Workflows
- Sales Acceleration

Helping companies evolve with Microsoft technologies

For companies and organizations to thrive, they must continually evolve. Today, that evolution requires digital technologies, ranging from simple websites for local businesses to complex sales enablement tools to support global companies. When customers want to invest in technology as a business enabler, such as Microsoft Dynamics and Adobe Document Cloud, many turn to the experts at Hitachi Solutions Europe, Ltd.

Hitachi Solutions is one of the world's largest consulting firms specializing in Microsoft and Adobe solutions, particularly Microsoft Dynamics and Adobe Sign. The company operates in multiple sectors, but focuses particularly on professional services, public sector, financial services, insurance, and retail. From major global enterprises to small local organizations, Hitachi Solutions helps customers transform their businesses by deploying Microsoft and Adobe solutions along with offering best practices and industry know-how from Hitachi Solutions specialists.

Like many of its customers, Hitachi Solutions is undergoing a significant evolution. Over the past seven years it's grown dramatically, both organically and through acquisition, increasing its headcount tenfold. The company wanted to help ensure its own processes were optimized to support customers by delivering fast, consistent service and smooth transitions between sales, consulting, support, and other teams at Hitachi Solutions. Therefore, Hitachi Solutions does not just deploy Microsoft and Adobe solutions for its customers, it also relies on Microsoft and Adobe solutions in-house to improve processes and better serve its customers.

One area that Hitachi Solutions identified for process improvements was sales contract management. Traditionally, teams used paper-based workflows for all customer agreements, including non-disclosure agreements (NDA), framework consulting agreements, work orders, and legal documents. They would mail multiple copies of paper documents to customers who would need to sign and return copies by post.

While the multiple types of customer agreements can be complex and contain up to 100 pages, they are imperative for effective service delivery. Agreements need to be signed in the correct order before proceeding to the next stage of a customer engagement. For example, NDAs must be completed before working on framework consulting agreements to help ensure mutual confidentiality. As a result, any time spent waiting for signatures would delay customers in engaging Hitachi Solutions' services. That meant customers could wait longer to benefit from efficiencies from new technologies, while Hitachi Solutions could lose revenue by missing out on billable hours.

The traditional paper-based sales contracting process had many disadvantages. Postal mail was slow, and documents could get lost. Managing the documents—creating, sending, and filing—also took a great deal of time for staff. Critically, handling paper workflows 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.



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Kyle Hill, Dynamics 365 Pre-Sales Solution Architect, Hitachi Solutions Europe, Ltd.

“The manual paper processes didn’t fit with our reputation as a technology leader,” says Simon Drake, Senior Vice President and UK General Manager at Hitachi Solutions Europe, Ltd. “We decided to move toward fully digital contract management processes to improve visibility and provide customers with a much more seamless service.”

Partnerships with Microsoft and Adobe

As a leading Microsoft Professional Services partner for Microsoft Dynamics, Hitachi Solutions became an Adobe Partner following the announcement of seamless integration capabilities between Microsoft Dynamics and Adobe Sign, the e-signature solution in Adobe Document Cloud. Hitachi Solutions was already using Microsoft Dynamics 365 internally to manage customer relationships. At first, it worked with a demo version of Adobe Sign simply to understand the solution and deploy it as part of its consulting engagements with clients.

After seeing how customers benefited from increased efficiencies and ease of use with the integrated technologies, Hitachi Solutions realized that it could also take advantage of the Adobe Sign and Microsoft Dynamics integration to improve its own processes with fully digital contract and agreement workflows.

Using the integration, Hitachi Solutions can create and send contracts, agreements, and other documents with a single click in Microsoft Dynamics 365, while taking advantage of more secure digital signature and traceability features in Adobe Sign. Signed documents are stored in Microsoft Dynamics 365, through the native integration with Microsoft SharePoint. This enables a central repository to be created for each customer where all commercially sensitive and compliance documentation can be retained and shared as necessary.

“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, Dynamics 365 Pre-Sales Solution Architect at Hitachi Solutions Europe, Ltd. “The whole process of deploying Adobe Sign was extremely easy. We had great dedicated support from Adobe and responsive presale resources that helped us achieve our goals.”

Creating a single source of customer information

By implementing fully digital workflows, Microsoft Dynamics 365 is used by Hitachi Solutions as the single true source of customer information. When creating agreements, information is pulled directly from the record into the template stored in Adobe Sign, which reduces the risk of errors caused by copying and pasting data. If the customer updates any information in the agreements, such as contact names and numbers, that data is automatically pulled back into and updated in the Microsoft Dynamics 365 record. This helps Hitachi Solutions maintain more accurate customer intelligence and better communicate with customers.



“We can provide more professional, seamless customer services with Adobe Sign and Microsoft Dynamics 365 because everyone is literally on the same page.”

Celine Pepaj, Marketing Manager, Hitachi Solutions Europe, Ltd.

Once documents are signed and returned to Hitachi Solutions, they are automatically pulled into the Microsoft Dynamics 365 record and then uploaded to a Microsoft SharePoint location associated with the customer. Hitachi Solutions saves thousands of pounds per year in storage costs because it no longer needs to archive paper documents.

More importantly, having a single digital location for all customer documents gives sales, customer support, and consulting staff equal access to the same source of customer information. Staff can even view documents while working with customers in the field. Previously if staff needed to double-check a work order, they had to wait until they were back in the office to hunt down a paper document. Now employees can quickly pull up documents on a mobile device.

“Having all documents centralized in one location gives us much greater visibility into document content and when they’ve been signed,” says Celine Pepaj, Marketing Manager at Hitachi Solutions Europe, Ltd. “We can provide more professional, seamless customer services with Adobe Sign and Microsoft Dynamics 365 because everyone is literally on the same page.”

Increasing billable hours by accelerating contract workflows

Using the integration between Microsoft Dynamics 365 and Adobe Sign, members of the sales operations team and Program Management Office (PMO) send about one document per day invariably supporting contracts worth millions of pounds. In addition, there are often multiple language versions of each document required for global clients.

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

Because all workflows are initiated directly through Microsoft Dynamics 365—software that staff are already familiar with—they needed little training to start sending electronic documents for signature with Adobe Sign.

“We had some internal training about how to use Adobe Sign workflows, but most staff just picked up how to do this on their own in just a few days,” says Kyle Hill. “By automating document management workflows with Adobe Sign and Microsoft Dynamics 365, employees now spend half the amount of time processing paperwork.”

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 days. This dramatically shortens the time for customers to start receiving Hitachi Solutions’ services. While customers appreciate starting engagements sooner, the faster completion of agreements also benefits Hitachi Solutions.

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SOLUTION AT A GLANCE

Adobe Document Cloud

Adobe Sign

Microsoft Dynamics 365

“Our primary asset is our expert staff who deliver billable work to customers,” says Simon Drake. “The integration between Adobe Sign and Microsoft Dynamics 365 ultimately improves our bottom line by allowing us to complete contracts faster so staff can start working on client projects much sooner.”

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. The quicker engagement process also benefits customers in that their own teams can avoid downtime waiting for documentation to be signed in order to start projects with Hitachi Solutions.

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 documents, and other necessary data to provide a clear audit record for each signature. Having this record of data improves auditability for Hitachi Solutions' audit partners as well as corporate compliance requirements from its headquarters in Japan. It also helps Hitachi Solutions demonstrate compliance to GDPR and other information and privacy regulations.

Hitachi Solutions hopes to extend use of Adobe Sign from customer relationship management to other processes that require signatures, such as Human Resources paperwork.

“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,” says Simon Drake.

For more information

<http://acrobat.adobe.com/us/en/sign.html>



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