

WHITE PAPER

Standardise on Acrobat. Connect every employee.

How Adobe Acrobat creates smoother document processes to power more collaborative, productive teams.

As an IT leader, it's important that teams across the organisation work more efficiently, increase productivity, decrease security risks and save on costs. This includes the way they manage documents. Since many teams in your organisation already use Adobe Acrobat, they've seen the benefits that more efficient document management provides.

By replacing paper documents with PDFs, many employees have likely experienced smoother workflows, fewer time-consuming manual tasks, more efficient document reviews and fewer compliance risks. But to really drive greater efficiency and productivity, these benefits need to be scaled across the organisation. That means standardising the way teams work with PDFs.

When every employee has access to Adobe Acrobat, teams from every part of the business can collaborate on documents more easily using the tools they work with every day, improving not only the employee experience, but the customer experience as well.



PDF takes centre stage.

The PDF is more relevant than ever as businesses shift to fully digital processes and look for ways to get more value from the data in their documents. With more than 2.5 trillion PDFs circulating worldwide, these documents are the lifeblood of an organisation.



PDF is the top business file format used by almost every industry and can be opened on nearly every modern device.

However, not all PDFs are alike. Working with PDFs that can't be opened by other users, display text inconsistently or aren't searchable can lead to lost time, lower data integrity and reduced revenues.

By standardising on Acrobat across your organisation, teams can easily view, [edit](#), collaborate and transact on document workflows – including e-signatures – without ever leaving the app. And you can get more from your Acrobat investment. In this white paper, we explore how groups across the organisation – including HR and sales teams – use Acrobat to improve the employee experience, eliminate manual workflows and help ensure compliance and collaboration across the organisation. By working with department leads to proactively identify potential areas of opportunity, you can take a more strategic, hands-on approach to removing process and departmental silos through improved document workflows.

Choosing the right PDF app

To better understand the differences between PDF types, it's helpful to think of them in terms of high-fidelity and low-fidelity documents. High-fidelity PDFs – like those created in Acrobat – are documents that make it easy to:

- Extract data accurately
- Collaborate in real time within Microsoft applications
- Edit on mobile devices
- Allow for manipulation such as compression and optical character recognition

They also meet the highest industry PDF standards and regulatory requirements, including the ability to tag PDFs with accessibility so everyone can read them.

On the other hand, low-fidelity PDFs are inconsistent, unreliable and could pose security or compliance risks. Because these documents are produced with low-cost PDF applications, they may not display information properly and could lack search and compression capabilities. As a result, they can't be used to automate processes, they waste staff time through manual searches, have high security risks and deliver poor-quality experiences.

HR: Creating efficient onboarding experiences.

In a competitive job market, organisations need to attract the best people, help employees work more efficiently and provide the most engaging experiences for candidates as well as for new and current employees. However, paper-based and manual practices slow down recruiting and onboarding, reducing candidates' enthusiasm and new hires' engagement. Remote work environments and cumbersome processes hinder team collaboration. And lack of a standard way to share and view information across teams – such as through accessible, compliant PDFs – can block progress.

Onboarding takes collaboration from HR, finance and legal teams. While finance works with HR to approve hiring budgets, finalise offer letters and manage payroll, legal provides input and authorisation for employment contracts and nondisclosure agreements, as well as ensures compliance with hiring practices. To ensure that information flows seamlessly from one team to another, every team in the business – not just a few – should be enabled with Acrobat. Here's how standardising with Acrobat can help HR work with teams across the enterprise more closely to increase efficiencies, attract and retain the best candidates, and improve the employee experience.

Simplify candidate reviews and approvals.

In the past, narrowing down potential candidates meant gathering the hiring team in a conference room down the corridor, reviewing paper resumes and interview notes, and submitting selected candidates to HR for approval and an ink signature. Acrobat can streamline the candidate review process by making it easier for teams to route, sign and approve documents.

The native integration between Acrobat and Microsoft applications – including Microsoft Teams – gives hiring and HR teams the power to work together, using their favourite tools to:

- Share PDF resumes for online review and feedback in Microsoft Teams
- Convert files from PDF to Microsoft 365 to edit, track and collaborate in real time
- [Convert](#) files from Microsoft 365 to accessible, secure, searchable PDF format
- Sign approvals electronically from anywhere, including on mobile devices
- Do it all using a single app

By expanding the use of Acrobat, teams can work even smarter together, spending less time switching between programs and more time getting strategic work done.

Build better employee onboarding packets.

For many HR teams, creating onboarding packets for new hires is a tedious, time-consuming process. Often, HR employees have to copy and paste between different applications, create customised pages from scratch, search for source files in order to make updates and send it all to the new employee for an email or paper signature.

With Acrobat, HR teams can collaborate with finance, IT and other departments to make the employee onboarding process smoother, providing a better experience for new employees. Teams can create customised onboarding packets more efficiently by combining and organising the right documents for each candidate easily, extracting pages out of different PDF files to reuse and making last-minute edits directly in the PDF rather than wasting time searching for source files. Once the package is ready, teams can send it out for e-signature with Adobe Acrobat Sign.

Streamline signatures.

From contracts and tax forms to offer letters and NDAs, candidates need to [sign multiple documents](#) from multiple departments as they go through the recruiting and onboarding process. But printing, mailing and collecting all of these physical signatures not only wastes resources and increases risk, but also creates a negative experience for HR and potential hires. For example, having paper-based processes prevents companies from being portrayed as digital-first, innovative organisations, which makes them less appealing to job seekers. This means the competition may hire the best candidate before you even get a chance to reach them.

When the entire organisation works in Acrobat, not only does the signature process move along more quickly, but everyone can take advantage of the integration between Acrobat and other apps like Acrobat Sign and Workday. This connection allows employees to take PDFs like an offer letter, route to signers on other teams, track, accept and store in a tamper-proof way – all while getting a complete, compliant audit trail for visibility.



Digital onboarding attracts top talent, lowers costs.

Illumina Inc., a global life sciences company, uses Acrobat to create customised onboarding packets for signature. They can also distribute documents automatically at the appropriate time during recruiting and onboarding, and store signed documents in employees' work files.

With the efficiencies they've gained, Illumina now:

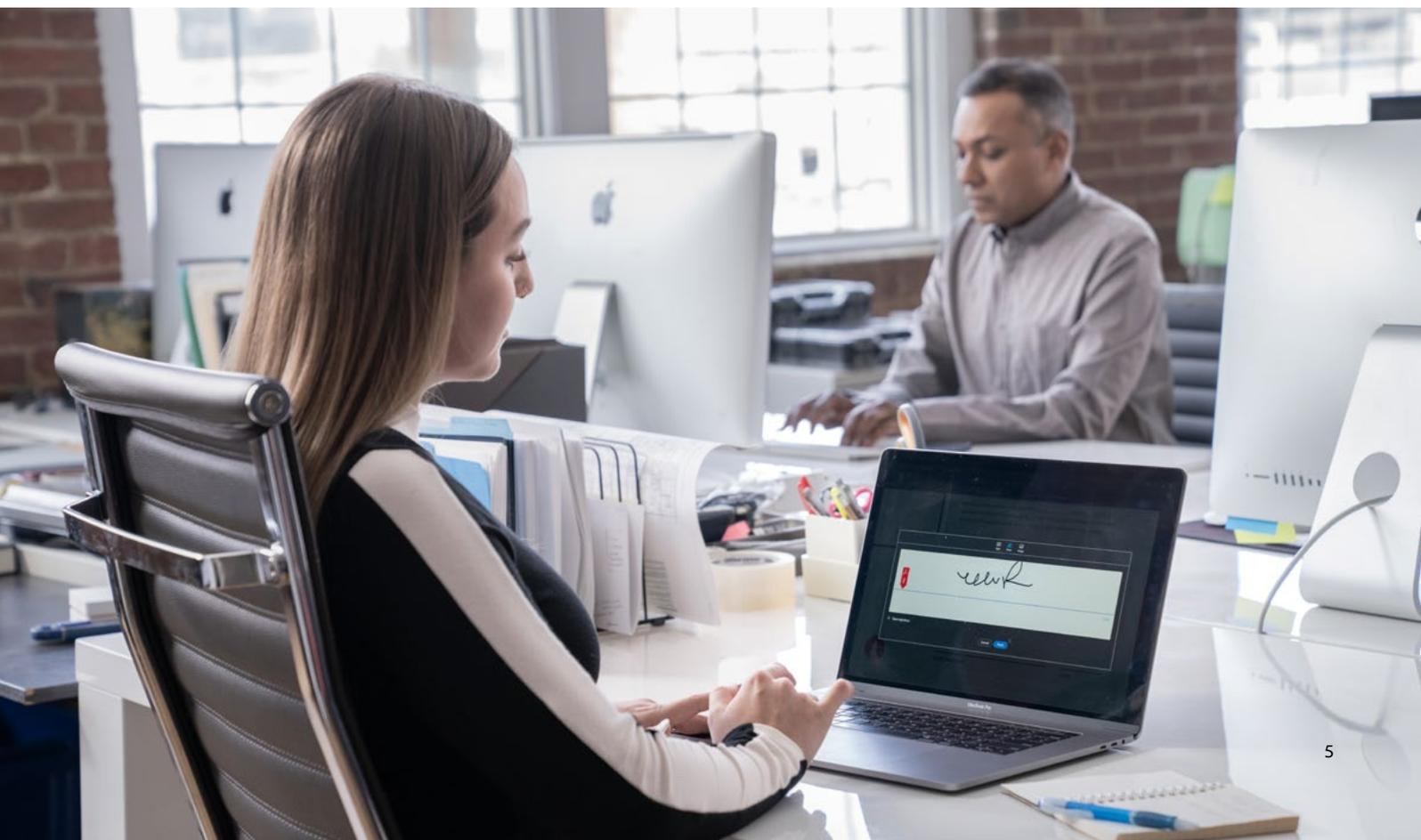
- Creates and sends 600 digital onboarding packets per month
- Saves £100,000 annually on mailing and labour costs

Secure every document, keep data private.

When it comes to complying with legal requirements and protecting data privacy, onboarding can get complicated. In addition to having multiple variations of new hire contracts and other documents to suit the needs of different regions, HR teams also need to ensure that sensitive data such as personal information and compensation figures are redacted or password protected. However, manually redacting text page by page is both time consuming and risky, as employees could redact information permanently by mistake.

With Acrobat, HR and legal teams can work together more closely, using pattern matching to automatically redact sensitive information like birthdays throughout PDF documents, as well as marking redactions so they can be reviewed before applying. They can also help ensure security and compliance with the ability to create accessible documents as well as implement access controls, sandboxing, watermarking and encryption. Finally, Microsoft Purview Information Protection provides an extra layer of security support, which is enabled by Acrobat's integrations with Microsoft 365 apps.

Adobe continues to invest millions into new innovations and application security processes to reduce risk, exposure and operating costs associated with regulatory noncompliance. Acrobat helps ensure that every document created is secure and compliant based on the leading standards for PDFs, allowing teams to share documents with confidence and reducing the burden on IT.



Sales: Working smarter, closing faster.

Sales wants to close more deals faster, increase customer satisfaction and provide positive customer experiences. But when they spend too much time searching for information manually or recreating proposals and documents, sales and renewals are delayed or lost, and revenues are put at risk.

When you give every sales rep the opportunity to use Acrobat, you help digitise their processes, reduce manual tasks and accelerate the sales cycle. With Acrobat, sales reps can create and send requests for proposals (RFPs) more efficiently, save time on proposals and presentations, and get more done while on the go – all using a single app.

Speed up sales proposal responses.

Developing a comprehensive response to an RFP means working with teams across the organisation – from finance and marketing to legal and product. Typically, a PDF is emailed between teams, edits are made and multiple new versions created. With so much back and forth, versioning spins out of control and the sales process can slow to a crawl.

By implementing Acrobat throughout the organisation, sales teams can collaborate more efficiently, get RFPs out the door faster and win more deals. Working in only one application, sales reps can pull pages from existing RFPs into their documents, reorder, edit text, add tables of contents and links, and gather feedback and approvals from colleagues in real time. If teams also use Salesforce or Microsoft Dynamics 365, they can store and send RFPs, quotes and contracts for legally binding signatures securely directly from their CRM application, which then automatically reports back to the sales, finance and operations teams through compliant audit trails.



The biggest advantage with Acrobat is that we can now convert all data to PDF and then combine it into a single file on a computer. This also makes searching easy and saves a lot of time.

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Reuse, don't recreate.

Many times, creating a new sales proposal for each major prospect takes longer than it should. That's because sales reps end up rewriting and recompiling the same information, taking time away from strategic work. Rather than recreate customer-facing presentations and assets from scratch, sales reps can reuse PDFs and shorten review times, freeing them up to focus on closing more deals.

When Acrobat is implemented across teams, employees can:

- Export existing proposals into Microsoft 365 formats to make updates
- Combine additional PDF information into documents without switching applications
- Conduct a live review of PDFs with colleagues and customers in Microsoft Teams instead of emailing back and forth
- Create, send, sign and manage proposals and contracts from just one app

Get more done while on the go.

Working on the go can be challenging when sales teams are handed paper documents and don't have a printer or a scanner handy. Maybe they need to add that document to their proposal while on a customer visit, send a signed PO to procurement, submit a contract for legal review or simply search for a certain piece of information in a multipage document.

The Adobe Scan mobile app allows sales reps to capture, scan and convert documents from a picture to an editable, fillable, searchable PDF – on any mobile device. They can then share and collaborate with sales, finance, procurement or customers.



Lead the way to workplace innovation.

As the way we work continues to evolve, IT leaders have an important role to play in managing technology and processes strategically for hybrid workers. Because today's workforce relies so heavily on documents to share information, smoother workflows are core to meeting IT and business goals.

By expanding the use of Adobe Acrobat and connecting business-critical tools like Workday and Microsoft applications, teams across the organisation can collaborate more closely without adding more complexity to your tech stack. The end result is better experiences for employees and customers.

In a digital-first world, work moves fast. Keep your business out front with Acrobat.

Learn how you can expand the use of Acrobat across your business to improve document workflows, increase team collaboration and get the most from your technology investment.

Resources

[Illumina Customer Success Story](#), Adobe, 2017.

["K" Line Logistics Customer Success Story](#), Adobe, 2019.



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