

Adobe Document Cloud & Microsoft 365: Improving Digital Experiences and Driving Significant Savings

Adobe and Microsoft provide organizations with enhanced productivity by enabling the robust functionality of Adobe Document Cloud from within Microsoft 365 applications. Document Cloud enhances an organization's digitization journey by helping to transform paper assets and manual processes into end-to-end digital experiences.

Forrester Consulting conducted two Total Economic Impact™ (TEI) studies on Document Cloud solutions, Adobe Sign and Adobe Acrobat DC, to provide a framework for the potential financial impact of a Document Cloud investment. Forrester interviewed several current Adobe clients, including many using Adobe solutions with Microsoft 365, to better understand the outcomes of their use of Adobe Document Cloud solutions.

Quantified benefits. The following risk-adjusted quantified benefits are representative of those experienced by the companies interviewed:

- › **Saves employees an average of 1.5 hours per transaction.** Organizations use Adobe Sign to digitize and automate formerly manual ink and paper signature workflows to create significant time savings that can be repurposed for valuable tasks. Adobe Sign e-signatures can be accessed directly from within Microsoft 365 applications enabling efficiencies, including:
 - Sending documents for signature and tracking their status within Microsoft Word, PowerPoint, Outlook, SharePoint, and Teams.
 - Adding signing steps to automated workflows within SharePoint.
 - Signing, tracking, and filing contracts within Microsoft Dynamics 365 for sales.
- › **Reduces enrollment transactions by two hours.** In addition to these general e-signature time savings, organizations leverage the integration between Adobe Document Cloud and Microsoft applications to digitize enrollment processes, saving organizations an additional two hours per enrollment transaction. Using digital processes to expedite onboarding and enrollment processes reduces time spent on these traditionally time-consuming tasks, improves customer experience, and reduces drop-off rates.
- › **Saves users up to 65 hours per year using Acrobat Pro DC and 33 hours per year using Acrobat Standard DC.** With the help of integrations between Acrobat DC and Microsoft applications, organizations see significant savings when users digitize paper-based tasks and work with PDFs directly within Microsoft applications. Users reduce rework by converting and editing PDFs, leverage mobile capabilities to continue workstreams outside of the office, and easily send and track documents. Acrobat Pro DC users are defined as power users of Acrobat. They work in departments that handle a lot of contracts, sensitive documents, and collateral like finance, marketing, IT, and procurement. The integration with Microsoft allows these Pro users to automate high complexity tasks saving significantly more time than an Adobe Standard DC user. By integrating Adobe Acrobat DC with Microsoft applications, organizations can make document tasks more efficient, including:
 - Converting Office files to PDF and combining multiple documents into one PDF file within Office 365 applications.

SUMMARY

Based on two commissioned studies, "The Total Economic Impact Of Adobe Sign" and "The Total Economic Impact Of Adobe Acrobat DC".

METHODOLOGY

The objective of the TEI framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact of Adobe Acrobat DC and Adobe Sign, including interviews with Forrester analysts, Adobe stakeholders, and several current Adobe clients. Forrester constructed a financial model representative of the interviews for each study using the TEI methodology.

COMPOSITE ORGANIZATION

Each analysis uses a composite organization, based on the interviewees, to present the aggregate financial analysis.

RISK ADJUSTMENT

Forrester risk-adjusted the financial models based on issues and concerns of the interviewed organizations to account for uncertainties in benefit and cost estimates.

- Converting PDF files into editable document files while preserving formatting.
 - Combining SharePoint folders into a single PDF and reviewing and commenting on documents in real-time in SharePoint.
 - Accessing and storing files in OneDrive while working within Acrobat DC.
- › **Reduces the use of paper and traditional hardware.** Organizations save costs by reducing the use of paper and traditional hardware through digitizing and automating signature workflows and other document tasks. By switching to an e-signature process and integrating Adobe Document Cloud with Microsoft applications, organizations reduce costs for shipping, paper, ink, printers, and scanners. Adobe Sign users can save an average of \$6 per document that they convert to a digital form. By replacing traditional hardware with mobile equipment and providing mobile access to documents and workflows, organizations using Adobe Acrobat DC can save as much as \$675 per user.
- › **IT administrators save 570 hours annually and by using Acrobat DC compliance FTEs can be repurposed to complete more business-critical activities.** In addition to the benefits generated by working seamlessly with PDF files within Microsoft applications, IT administrators save 570 hours annually and organizations are able to repurpose compliance FTEs. Prior to standardizing on Acrobat DC, IT administrators frequently received help desk tickets from users struggling to understand various legacy document software solutions. Standardizing users on one easy-to-use solution allows these organizations to reduce support costs by eliminating as many as 95 help desk tickets each month. Transferring forms to standard templates within Adobe Document Cloud allows organizations to reallocate compliance resources formerly dedicated to maintaining these forms.

“Any changes to our documents created significant delay. We were completing more contracts, and we had a lack of audit trail. There was a lack of obvious ownership, and there was also the risk of unauthorized signatures from both parties.”

General manager of operations, conglomerate



Over a three-year period, this can result in over \$9.1 million in combined benefits.



2.8x to 4.2x ROI



\$1.8M to \$7.3M NPV



28x faster cycle times



\$1.2M in paper and hardware savings

The Adobe Document Cloud Customer Journey

The participants in the two studies include:

- › **Adobe Acrobat DC TEI:** Forrester interviewed three organizations with 800 to 14,000 Adobe Acrobat DC seats.
- › **Adobe Sign TEI:** Forrester interviewed six organizations with 1,000 to over 2,000,000 Adobe Sign transactions in the past year.

Key Investment Drivers And Results

The interviewed organizations share the following investment drivers:

- › **Previous signature processes did not meet employee or customer expectations.** Manual processes and productivity tools that were not integrated prevented employees from completing tasks quickly, reducing the time they could spend on high-impact work.

Employees who traveled frequently or worked remotely needed a solution that was easy to use on a mobile device and didn't require access to printers or fax machines. Interviewees with employees across different regions needed a faster way than shipping to sign off on important documents. Customers increasingly expected more digital and mobile experiences, including for signature processes.

- › **Print and paper costs were too high.** Organizations had many processes that relied on paper. Forms were printed, shipped, and scanned on a regular basis. This was not only costly from a paper, ink, and postage perspective but also required significant manual labor to track and store these documents. As a result, budgets for paper and print were quite costly for these companies.
- › **Manual signatures and paper-based tasks interrupted security and compliance workflows.** Interviewees noted that paper documents with sensitive information were easily lost and didn't always go directly to relevant parties. Paper documents were more difficult to update when text around compliance and regulation needed to be altered. Employees had to locate source files and ensure that all forms were sent out with the correct updated text, which was difficult without standardized digital forms.

The interviewed organizations achieved key investment results:

- › **Significant reductions in signature cycle times.** Interviewees experience significant reductions in overall time to obtain a signature. These reductions come from the use of mobile functionality to sign documents when working remotely, fewer cycles by reducing errors and rework associated with errors, automation of and access to e-signature workflows directly within Microsoft applications, and easily templated forms that limit the customization that needs to be completed by users.
- › **Digital workflows improve customer experience.** By digitizing their enrollment processes, interviewees save additional time. Lengthy and complicated enrollment processes can be completed in a fraction of the time needed for legacy workflows. Digital forms streamline the customer experience and eliminate errors and delays produced from manual processes that require duplicate data entry. E-signature workflows allow customers to easily sign forms which creates a better overall customer experience, leading to fewer customers dropping out of enrollment processes.
- › **Employees improve their efficiency when managing documents.** The interviewed organizations noted Acrobat makes users more efficient in several key workflows. Employees can decrease or eliminate rework associated with creating and locating source documents. They can reduce inefficiencies and errors associated with paper documents and convert scanned paper documents into editable digital files. They can merge content from multiple sources into one PDF file to bring all relevant information into one central location. Employees are also able to collaborate with others within one PDF file with Acrobat's comment and review tools. By integrating Acrobat DC with Microsoft applications, employees have access to this functionality directly within the Microsoft tools they use everyday.
- › **Organizations reduce their paper footprints and avoid printing and shipping costs.** Interviewees reported that by investing in Acrobat, they have reduced the number of documents they need to physically ship. Instead, users can digitally send and track documents, including directly from within their Microsoft applications. In addition, users no longer need to physically transport documents to their correct destinations, which improves overall employee experience.

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected for each study.

Adobe Acrobat DC composite characteristics: The organization standardizes on Adobe Acrobat DC for all PDF documents. It uses Acrobat across the organization but

"Adobe Sign has significantly reduced the turnaround time and the time to process, the cost of processing, and very interestingly it reduced the number of complaints because it was taking us a long time to process these pieces of paper before."

General manager of operations, conglomerate



"Users are definitely saving time, and they're saving frustration as well. I can confidently say that Adobe Acrobat DC is faster, easier, and more reliable than our previous solutions."

Product manager, healthcare company



identifies more use cases in finance/accounting, marketing, IT, and HR. The organization purchases 1,200 Adobe Acrobat DC licenses, and it deploys all licenses at the start of Year 1. Adobe Acrobat DC is integrated with Microsoft 365 applications.

Adobe Sign composite characteristics: Adobe Sign usage spreads across the company eventually leading to 1,200 active users by the end of Year 3. Forrester assumes that active users generate documents for signature and modify templates as well as many one-off use cases. During the initial year of using Adobe Sign, the composite organization completes 75,000 Adobe Sign transactions; this number grows to 100,000 transactions per year by Year 3. The composite organization uses Adobe Sign to digitally enroll and onboard new customers and employees as well as to collect e-signatures. The organization also integrates Adobe Sign with Microsoft applications to enable e-signature functionality directly within these applications.

Financial Summary

The financial results calculated in the Benefits and Costs sections of the full report can be used to determine the ROI and NPV for the composite organization's investment in Adobe Acrobat DC and Adobe Sign. Forrester assumes a yearly discount rate of 10% for this analysis.

- › The total present value (PV) of benefits for Adobe Acrobat DC is \$2.4 million and the net present value (NPV) is \$1.8 million over three years.
- › The total PV of benefits for Adobe Sign is \$6.8 million and the NPV is \$5.5 million over three years.

For more information, you can download the full Adobe Acrobat DC analysis [here](#) and Adobe Sign analysis [here](#).



Key assumptions:
1,200 Adobe Acrobat DC users

- 720 Acrobat Pro DC users
- 480 Acrobat Standard DC users
- 170 field agents

1,200 active users of Adobe Sign by Year 3

Adobe Document Cloud



**2.8x to 4.2x
ROI**



**\$1.8M to \$7.3M
NPV**

Disclosures

The reader should be aware of the following:

- › The study is commissioned by Adobe and delivered by Forrester Consulting. It is not meant to be a competitive analysis.
- › Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the report to determine the appropriateness of an investment in Adobe Document Cloud.
- › Adobe reviewed and provided feedback to Forrester. Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning.
- › Adobe provided the customer names for the interviews but did not participate in the interviews.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. <https://go.forrester.com/consulting/>

ABOUT TEI

Total Economic Impact™ (TEI) is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists vendors in communicating the value proposition of their products and services to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of IT initiatives to both senior management and other key business stakeholders. The TEI methodology consists of four components to evaluate investment value: benefits, costs, risks, and flexibility. <https://go.forrester.com/consulting/content-marketing-consulting>.

© 2019, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to forrester.com.