



## BUYER CASE STUDY

# NetApp Optimizes Document Workflows Using Adobe Sign

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## IDC OPINION

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NetApp, a Fortune 500 computer storage company, realized it could gain workflow efficiencies and increased productivity by digitizing many of its signature-based document workflows. Workflows and signatures for key sales, human resource (HR), and legal documents were slow, cumbersome, and costly. The company had to find a way to make signatures and authorizations more efficient for customers and employees alike. NetApp decided to move forward with digitizing paper-based signature workflows by integrating EchoSign. Adobe's 2011 acquisition of EchoSign (rebranded to Adobe Sign) and subsequent integration within Adobe Document Cloud in 2015 solidified NetApp's relationship with Adobe, deploying Sign services in Adobe Document Cloud as an enterprise esignature solution. After using Adobe Sign and Document Cloud, NetApp has been able to reduce sales contract workflow time by two weeks. In 2015, over 16,000 documents were signed using Adobe Sign, giving NetApp an estimated cost savings of approximately \$3.2 million. In detail:

- NetApp had originally used EchoSign technology prior to Adobe's acquisition of EchoSign. NetApp has chosen to stay with Adobe because of the cost-effectiveness and ease of use of the Adobe Sign tool.
- A key requirement for NetApp was that the vendor was able to provide a solution that could easily connect into other tools and programs used by various areas of the business.
- With partnership and support from Adobe, NetApp is taking steps to grow its deployment of Adobe Sign into new departments within its organization.

## IN THIS BUYER CASE STUDY

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This IDC Buyer Case Study looks at how NetApp, a computer storage company, selected Adobe as its esignature partner. Organizations that are currently engaging in or evaluating esignature solutions and/or partners can gain valuable insight from the firm's experiences. This document examines why the firm needed an esignature solution, the organization's main requirements, how the vendor relationship developed, results, and lessons learned. This Buyer Case Study can help organizations more effectively evaluate partners and aid in optimizing esignature contracts and relationships.

## SITUATION OVERVIEW

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Organizations are continually looking to relieve pain points and automate tasks within their document workflows in order to improve processes, increase productivity, reduce costs/errors, and improve service. IDC has seen organizations increasingly invest in technologies that help facilitate the next level of document automation; esignature represents one such process. As organizations begin to invest in esignatures, they are looking for vendors well suited to drive the next level of business automation by optimizing document processes.

NetApp found that its document processes for collecting signatures for sales, human resource, nondisclosure agreements (NDAs), and legal documents were time consuming and inefficient. It invested in esignatures for the first time in 2011; today, using Adobe Sign services, NetApp has realized significant increases in productivity, satisfaction among workers/customers, and improved financial performance. For this IDC Buyer Case Study, we interviewed Connie Brenton, senior director of Legal Operations, and Emily Teuben, senior legal operations manager of the Legal Department at NetApp.

## Organization Overview

Established in 1992, NetApp is headquartered in Sunnyvale, California. NetApp offers software, systems, and services to manage and store data within enterprises, service providers, and partners. The company is a member of the S&P 500, has over 12,000 employees in more than 150 offices worldwide, and holds over 3,200 patent assets.

## Challenges and Solution

### Challenges

Before NetApp's relationship with Adobe and the esignature implementation, the company had several challenges surrounding its document processes involving signatures. First, paper documentation was hindering staff productivity and efficiency. Signing legal documents often required heavy dependence upon a few stakeholders in the organization. If these stakeholders were not around or left the organization, documents requiring signature often fell into limbo. In addition, auditing and tracking paper documents within the company was difficult, time consuming, and inherently risky, often relying on workers and slow manual processes to route documents to key departments and individuals.

NetApp required a solution that could handle signature processes with little user training and support from IT but found many document automation processes too complex. With paper documents, getting signatures often took extended periods of time, high volumes of consumables, and dependency on others to complete. Last, as a B2B business, NetApp wanted to improve the approval and signature process for its customers and saw a pronounced competitive advantage in doing so.

### Selection

Within NetApp, the legal department is a critical hub for document processes, as it is one of the few departments that spans the entire enterprise. The technology that the legal department uses for its document workflows affects and influences workflows in other departments. The legal team saw the ability to digitize and offer electronic signatures as not only a way to improve processes in their own department but a part of a transformative change management strategy across the entire company.

When NetApp's legal department first deployed esignature technology, the company required neither the involvement of a third-party service provider nor even its own IT department. Today, the company actively reviews its technology investments, completed several periodic comparisons of Adobe Sign versus other esignature offerings, and has repeatedly chosen to remain with Adobe Sign because it meets several critical criteria. In detail:

- **Ease of use:** NetApp highly values the ease of use and simplicity of Adobe Sign. The company trains the majority of its Adobe Sign end users in under 30 minutes (those working in more complex document processes require a longer training period).

- **Cost:** Many esignature vendors charge on a "per signature basis," which is not cost effective for a company that saw over 16,000 documents signed via esignature in 2015. NetApp has found Adobe's subscription pricing for the enterprise to be more cost effective, predictable, and scalable.
- **Service:** NetApp has found Adobe's customer service to be excellent and responsive. During the interview with IDC, Teuben commented, "We feel that Adobe treats us more like a partner than a customer."
- **Resource use:** NetApp was concerned that competing solutions, while relatively user-friendly once deployed, may still require significant dependency on IT resources. Because of Adobe's cloud deployment capabilities, NetApp's esignature solution requires only a limited number of departmental experts and little to no IT involvement.
- **Integration capabilities:** For NetApp, it was imperative that esignatures integrate with existing systems, such as Salesforce and Apttus Contract Management; as such, Adobe Sign's extensibility with other critical business systems is key to the deployment's success.

Another major benefit has come from Adobe incorporating Adobe Sign into its Document Cloud offering (for more detail on how Adobe Document Cloud and Adobe Sign have affected NetApp's document processes, see the Advantages of Adobe Document Cloud and Adobe Sign section).

## Implementation

NetApp's initial esignature implementation was relatively simple and completed by the legal department within a week. Today, legal continues to serve as the department in charge of rolling out Adobe Sign to other areas of NetApp. IT's time investment has been limited to the creation of a single sign-on point for all users in the company, which allows legal to grant access to Adobe Sign with its NetApp company ID.

The biggest hurdle to implementation was placating organizational concerns about the legality of esignature. Many were concerned about removing paper-based signatures and the security of esignature. "It [Adobe Sign] was an exercise in change management and getting everyone comfortable with the process," said Brenton. To ease the minds of stakeholders, outside legal consultants were retained; today, as NetApp continues to develop more complex document workflows, it works with Adobe to ensure the legality and security of its esignature technology.

Since its initial adoption by the legal department, Adobe Sign has been adopted by NetApp's supply chain, sales, marketing, and human resources departments. This makes 30 total use cases for Adobe Sign and Document Cloud.

## Advantages of Adobe Document Cloud and Adobe Sign

The benefits that NetApp has seen from its investment in Adobe Sign continue to expand, thanks to Adobe's integration of Adobe Sign into the Adobe Document Cloud product offering. NetApp has noted considerable increases in functionality and design of Adobe Sign having a direct correlation to its incorporation within Adobe Document Cloud. NetApp also believes the incorporation of Adobe Sign into Adobe Document Cloud has helped evolve Adobe Sign from a point solution to a solution with an enterprisewide reach.

NetApp has taken advantage of the Adobe Document Cloud's capabilities to design workflows that incorporate esignature and the ability to update/scale forms quickly using the cloud. For example, in

December 2015, NetApp acquired SolidFire, an all-flash storage systems provider. Because of the acquisition, NetApp's HR team was required to send out over 400 documents to SolidFire employees.

Before the implementation of Adobe Document Cloud, the HR department would've had to print and overnight offer letters to the employees, requiring employees to print, sign, and mail the offer letters back – taking weeks to complete the hiring process and incurring unnecessary expenses and lost productivity. Instead, with Adobe Sign, NetApp's legal department helped HR create a document workflow that incorporated a document template, its own naming and branding convention, and esignatures into one automated process. As a result, the setup and processing for HR documents for SolidFire employees took a matter of hours rather than weeks.

Adobe Document Cloud's ability to convert sections of documents into fields requiring esignature has also helped NetApp save time when updating forms. Previously, NetApp would have had to recreate forms start from scratch, using the original PDF or Word document; today, updating forms and fields is as simple as hitting an Adobe eSignature button within Adobe Acrobat DC, saving many hours of document recreation time.

## Results and Benefits

Today, over 13 different departments at NetApp use Adobe Sign and Document Cloud, and the process of esignature within automated document workflows is embedded in company culture. With Adobe Sign, NetApp has seen increases in productivity and lowering of costs related to documents. The biggest impact of Adobe Sign has been in the human resources department where offer letters/new hire forms, employee training, and other important documents can all now be automated via esignature.

In addition, every week the number of documents signed using Adobe Sign is reported to NetApp's CEO, with a cost savings metric of \$200 attached to each document. In 2015, over 16,000 documents were signed using Adobe Sign, giving NetApp an estimated cost savings of approximately \$3.2 million.

While cost savings are significant, NetApp has seen other benefits to implementing the solution. For the legal department, stakeholders can now provide and gain signatures instantly. This is especially critical for workflows involving NDAs. With Adobe Sign, the sales staff has automated up-to-date NDAs and accelerated sales cycles. "In terms of volume, we see NDAs as the biggest low-hanging fruit when it comes to getting documents signed by customers," said Brenton. "Adobe Sign has really helped to automate this process and shorten the negotiation time frame with clients."

Documents requiring signatures are no longer impeded by time zone or location of the signer. During our interview, Brenton and Teuben recalled a situation where an important legal document was signed and submitted while the stakeholder was on a plane. NetApp has also taken advantage of Adobe Sign's mobile functionality, which provides signers even greater flexibility. In addition, NetApp has found that the ability to audit and track signed documents is faster, more efficient, and more reliable, eliminating reliance on individuals whose time can now be better spent on higher value work. Even in the cases where the document has been signed on paper, Adobe Sign prints out a barcode on documents, allowing the paper content to automatically be tracked once digitized.

## ESSENTIAL GUIDANCE

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NetApp has the following advice for organizations considering an esignature solutions engagement:

- Successful deployment of an esignature solution is highly dependent on a good change management strategy. Make sure that stakeholders understand the importance of the change and the benefits they will receive from using esignature and engage with a vendor willing to work as a partner across the entire document ecosystem.

Inefficient workflows slow business and eventually impact the bottom line. An IDC workflow automation study of businesses ranked pen-and-paper signatures as one of the key pain points that ultimately spurred respondents' interest in business and document automation.

Integration of mobility, cloud, social networks, and predictive analytics is changing when, where, and how business is conducted and altering client relationships and communication. As these technologies continue to permeate the business world, we expect businesses will provide employees access to business processes and content anywhere/anytime, to ultimately accelerate engagement cycles and deliver a better experience for customers and employees alike. To achieve this, it will be critical that document workflow with approval processes integrate an esignature solution that is both easy to deploy and extensible across an array of workflows.

## LEARN MORE

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### Related Research

- *Cost Analysis of Knowledge Worker Document-Related Activities by Function* (IDC #US40648216, March 2016)
- *IDC PlanScope: Digital Transformation of Document Workflows – Leveraging Automation and Optimization for Competitive Advantage* (IDC #US40645315, December 2015)
- *IDC MaturityScope: Digital Transformation of Document Workflows* (IDC #US40656515, December 2015)
- *IDC FutureScope: Worldwide Imaging, Printing, and Document Solutions 2016 Predictions* (IDC #259824, November 2015)

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