Adobe Acrobat Sign

The power of connection.

Work smarter by integrating e-signatures into the business apps you use most.

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The e-signature rise.

Among the many pivots organizations have recently made, one of the most crucial—for day-to-day business getting done—was the wide-scale adoption of e-signature technology. In fact, in *How Digital Document Processes Are Shifting from Best Practice to Business Necessity*, a 2020 commissioned study conducted by Forrester Consulting on behalf of Adobe, 58% of global business leaders said the pandemic accelerated their adoption of e-signatures. That number's been climbing ever since.

The ability to send encrypted documents securely, capture signatures, and return re-encrypted documents made it possible to sign contracts, hire employees, and manage operations—all from a distance.

Of course, e-signature technology was helpful before the pandemic. But now it's become an essential tool, helping organizations not only get work done but also grow.

And yet, with all the efficiencies gained, some e-signature users are grappling with a new set of digital inefficiencies, such as reminding people by email to sign their documents, switching constantly between programs, and dealing with other repetitive administrative tasks.

There is a solution: integrating e-signatures into your existing business applications. Even those who use e-signature technology regularly may not be taking advantage of integration into the other tools they use every day like Microsoft 365, Salesforce, Workday, and dozens of other common platforms and apps. These integrations open the door to even greater efficiency and task automation—increasing workflow and the bottom line.

"E-signature integration doesn't just eliminate labor-intensive manual processes, but it can also decrease the chance of errors," says Jolien Lang, senior market research manager at Adobe. "The ROI is significant."

Top 5 wins with e-signature integrations.

1. Save time by streamlining workflows.
2. Make customers' lives easier.
3. Make processes more efficient.
4. Automate tedious tasks.
5. Enable organizations to get more out of their apps.

The power of app integrations.

When your business adopts a strong e-signature solution, you realize benefits from increased security and quicker timelines to streamlined workflows across teams. But the efficiency of e-signature technology is amplified even further when it's integrated into the software you already use. Instead of a separate manual process tacked onto the end of your workflow, signing documents becomes an easy step within an existing application.

Integrating Adobe Acrobat Sign Solutions, for example, into other key software means you don't have to toggle between different apps. When you're ready to send a document for a signature, you can do so right from the program you're already working in.

Cutting down on the number of tools needed to send documents is just the beginning of what integration offers. It also makes it possible to automate a number of additional tasks—even across departments.

To take just one example, consider all the HR steps involved in onboarding a new employee.

"The e-signature process can act like an 'Activate' button for many other tasks and processes.

Jolien Lang, Senior Market Research Manager, Adobe

"When there's a decision made to give an offer to a candidate, there are usually multiple pages of documents to send and have signed, which could take several days to do manually," Lang says. "The signature process can really be a pain point."

With an integrated e-signature solution, an HR manager could automate several of these labor-intensive activities.

"For example, once a signature is secured, it could immediately trigger the HR system to send out benefit information to the new hire," Lang says. "The IT system could be triggered to send out a purchase order for new equipment and set up network credentials. These are the types of efficiencies that you can get with integrations. The e-signature process can act like an 'Activate' button for many other tasks and processes."
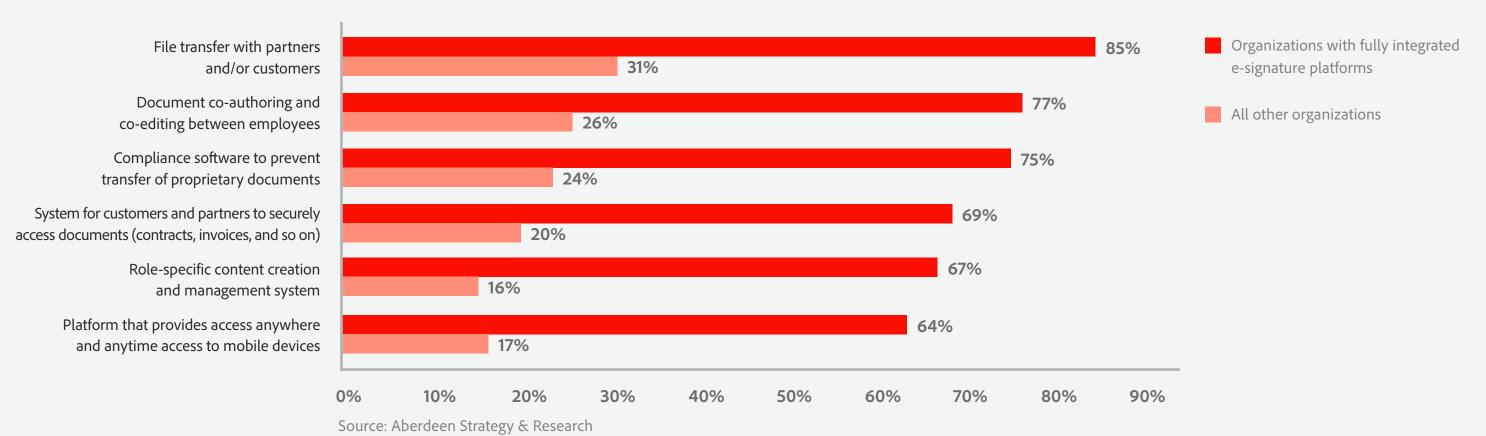
The business impact of integration.

Companies that integrate their e-signature platform into their digital solutions have more optimized capabilities across content management, document access, and security, according to *Modernized E-Signatures Boost Efficiency, Empower Employees, and Satisfy Customers*, a 2021 study by Aberdeen Group.

Organizations with e-signature integrations are 80% more likely to report high customer satisfaction than those without integrated e-signature solutions, the study found. They are also half as likely to need IT's help getting signatures on contracts and 40% more likely to see increased revenue.

"Reducing turnaround time and saving costs are the main drivers for companies adopting e-signatures," Lang says.

Better all-around document capabilities with an integrated e-signature platform.

Businesses with end-to-end document and e-signature capabilities were more likely than their peers to enable:

Capability	Organizations with fully integrated e-signature platforms	All other organizations
File transfer with partners and/or customers	85%	31%
Document co-authoring and co-editing between employees	77%	26%
Compliance software to prevent transfer of proprietary documents	75%	24%
System for customers and partners to securely access documents (contracts, invoices, and so on)	69%	20%
Role-specific content creation and management system	67%	16%
Platform that provides access anywhere and anytime access to mobile devices	64%	17%

■ Organizations with fully integrated e-signature platforms

■ All other organizations
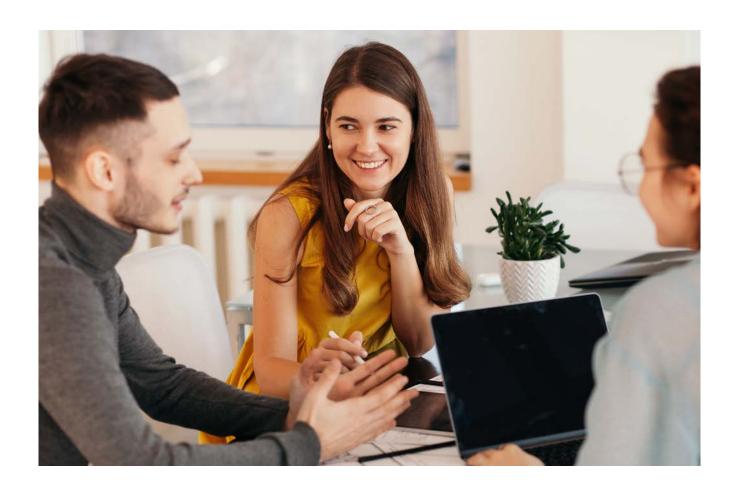
Source: Aberdeen Strategy & Research

Integration spotlights:
Microsoft, Salesforce, and Workday

Adobe partners with dozens of leading companies to make it easy to add Adobe Acrobat and Acrobat Sign Solutions to the systems, processes, and applications that organizations use every day. From HR and sales to procurement and legal departments, there are opportunities to improve productivity across every part of your organization.

Let's take a closer look at Acrobat Sign Solutions integration with three popular solutions.

Acrobat Sign Solutions + Microsoft

Your team is surely familiar with—and probably already uses—Microsoft 365, the industry standard for office software that's increasingly being used outside the traditional office. A great way to maximize your investment in the Microsoft ecosystem and streamline the last mile of your business processes is by integrating with Acrobat Sign Solutions, the preferred e-signature solution for Microsoft.

Acrobat Sign Solutions let you access e-signature tools right from your Microsoft 365 navigation window in Teams, Outlook, Word, PowerPoint, Approvals, Dynamics 365, and SharePoint. Here are just a few streamlined actions you can take with this integration:

- **Merge customer data and documents** from SharePoint into electronic contracts.

- **Create electronic contracts**, send them for e-signature approval, and track their status—right within Word, PowerPoint, Outlook, SharePoint, or Teams.

- **Detect which form fields are needed**—such as signature, name, and date—and place them in the document with one click using the AI tool Adobe Sensei.

- **Check in-progress document status** and take actions, like sending a reminder notification, directly from Teams.

With Acrobat Sign Solutions, you're able to manage all your e-signature needs inside more than 35 built-in Microsoft applications. When an agreement has been signed, you can provide a follow-up thank-you message automatically, as well as an audit report capturing the sequence of events and a copy of the completed document that's instantly archived with minimal effort.

"Microsoft and Adobe have so many integrations across the board, almost in every application," says Garrett Schwartz, product marketing manager at Adobe. "And if you want to build homegrown applications out of Power Automate or the power tools Microsoft offers, we have drag-and-drop capabilities to insert e-signatures into that process as well."

Acrobat Sign Solutions + Salesforce

Salesforce is the world's number one CRM platform, used by more than 150,000 organizations of every size. Sales teams live in this software—and your e-signature processes can too.

Acrobat Sign Solutions has powerful built-in integrations with Salesforce, which is why more than half of all Fortune 500 companies have chosen it as their e-signature solution. They can send from any object they have in Salesforce, whether standard out of the box or custom, and the integration also works with other vendor packages that have been installed from the AppExchange.

Case study: ICE

For Intercontinental Exchange (ICE), a global provider of marketplace infrastructure and data services, information is central to the financial industry—and technology is crucial to transforming operations. Always looking to improve its performance and become faster and more efficient, ICE knew the importance of e-signatures and digital document workflows.

But it was only after switching from its previous e-signature vendor to Acrobat Sign Solutions that ICE saw major improvements in its business processes, driven by Adobe's integrations with apps like Microsoft.

"Acrobat Sign Solutions met all three of our biggest requirements: competitive cost, high security, and a faster onboarding time," says Luke Xiehuan, director of information technology at ICE. "The integrations with other applications were an added bonus, making workflows even faster and easier. We have cut a significant amount of paper from our processes."

Within 2 years of working with Acrobat Sign Solutions, ICE processed more than 60,000 documents and was executing contracts in an average of just 7 minutes—even while serving international customers. For regulatory reasons, ICE integrated Acrobat Sign Solutions with a contract repository built on SharePoint so that completed contracts automatically connect back to the source.

"Like many companies, ICE has adapted to increased reliance on hybrid and remote working models over the past year," says Xiehuan. "Acrobat Sign Solutions helps us keep our customers and employees connected."

What else does this Salesforce integration enable businesses to do?

- **Create and send a new contract**—or check on a signing status—without leaving their Salesforce dashboard.

- **Integrate their signing data** directly into their Salesforce dashboard, gaining a view of their signing rate in conjunction with sales-focused data like pipelines and deals closed.

- **Use branded templates** already cleared by legal to help sales team members generate, send, and monitor agreements and quotes from a single screen, significantly saving time and reducing the chance for error.

- **Create a positive user experience** where, after signing the document, users are automatically navigated to a corporate thank-you page, company portal, or another next step.

One of the biggest strengths of Acrobat Sign Solutions is that it leverages all the information you already have in Salesforce. The package includes a range of prebuilt dashboards and reports, integrating the data for document e-signatures into the process intuitively.

"The beautiful thing is that, with all the configuration it took to put this into place," says Chris Merrill, senior solutions consultant for Adobe, "this is a really simple integration to build that doesn't require any code or customization. A Salesforce admin can figure it out."

Thanks to the simplicity of the integration, Acrobat Sign Solutions with Salesforce is quick and easy to set up—so users can get going in no time.

Case study: Baker Communications

As a performance improvement organization trusted by companies like Amazon to provide corporate training services, Baker Communications knows a bit about the best ways to work. Skilled in helping businesses enhance revenue, sales structure, and leadership to improve operations and optimize the customer experience, the mid-market agency with ambitions for major growth turned its strategic expertise inward and underwent a digital transformation.

After deciding that a proven e-signature solution was a vital first step in digitizing its paper-based processes, Baker selected Acrobat Sign Solutions and realized immediate benefits. Sales contracts that previously took up to three weeks to complete—with no visibility into status or ability to easily measure turnaround time—were suddenly being secured in two days.

"Getting documents signed quickly keeps deal momentum going, which is the lifeblood of our business," says Isidro Iturralde, strategic account manager at Baker. "Acrobat Sign Solutions transforms digital document experiences for our customers and keeps our business moving forward."

Baker uses Acrobat Sign Solutions to process 200–300 documents per month, more than 80% of which are sales contracts, and it can track progress with the audit trail feature. For Baker, though, the seamless integration with its Salesforce CRM platform is what makes Acrobat Sign Solutions a true game-changer for business.

Integrating Acrobat Sign Solutions and Salesforce—which automates the time-consuming process of developing, sending, signing, and uploading every contract—has meant a 75% improvement in document management. A grateful sales team is saving 50 hours a month on paperwork.

"The integration between Acrobat Sign Solutions and Salesforce is fantastic because we don't feel like we're moving between environments," says Iturralde. "The automated, end-to-end signing and approval workflows mobilize us to start work faster and be more effective."

" Your contract can reside in Salesforce while still retaining all of the compliance and legality that you receive from using Acrobat Sign Solutions, including the audit trail, which resides in Acrobat Sign.

Natasha Wyatt, Principal Product Marketing Manager, Adobe

Natasha Wyatt, principal product marketing manager at Adobe, explains the power of being able to send a contract directly from Salesforce while also leveraging the authority and security that Acrobat Sign Solutions brings to the table.

"Your contract can reside in Salesforce while still retaining all of the compliance and legality that you receive from using Acrobat Sign Solutions, including the audit trail, which resides in Acrobat Sign Solutions."

Before that integration, Wyatt explains, "You're in a world with a lot of steps every time you have to develop a contract." For example: call a colleague to find the right contract template; fill it out, upload it to Salesforce; email it to the prospect; receive it, then upload it again to Salesforce. "It's a lot of moving parts, a lot of clicks—just a lot of annoying work."

For those who have integrated Acrobat Sign Solutions and Salesforce, the process is improved in every way. "You now can initiate an entire Acrobat Sign Solutions signature process directly from the opportunity in

Salesforce, plugging in the information that was required," Wyatt says. "Just email it directly from Salesforce and then watch the progress of the contracts in the scope of your entire sales process."

An added bonus: There's no need to follow up because an automated email process does that and takes the "nagging salesperson" out of the loop. It improves the customer experience because they can sign documents on the spot without printing out a contract, signing it, and scanning it. And there's an audit trail of everyone who touches a document.

Acrobat Sign Solutions + Workday

As Salesforce is to sales, Workday is to HR. The most popular HR app as measured by the number of customers using it, Workday specializes in human capital management. And in the new world of work, attracting and retaining talent is more vital now than ever.

With e-signature integration, Workday software becomes even more powerful. From recruiting to onboarding, managing NDAs to completing training compliance, many key HR functions have a critical signature component.

Acrobat Sign Solutions is an increasingly popular solution for today's HR leaders looking to get more done within Workday. It's pre-integrated into the Workday Business Process Framework for HR, finance, and operations. An administrator with a license key can install, activate, and configure the integration in minutes. Users can then add Acrobat Sign Solutions to any of the 400-plus business processes inside Workday, including human capital, student, payroll, and financial management.

Here are just a few of the HR processes that hiring managers are speeding through with this integration, without ever leaving their Workday platform:

- Getting real-time insight into the status of HR documents across an organization—from NDAs to offer letters—including who's signed and who needs to sign next

- Routing complex agreements to multiple signers or groups and distributing one key agreement to multiple people for signing

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Case study: Radial

Acrobat Sign Solutions with Workday has benefited many businesses, such as the omnichannel ecommerce technology and operations company Radial, which has 7,000 employees in more than 30 locations.

Every year, Radial employees and candidates sign more than 300,000 documents. The company wanted to reduce onboarding time and complexity, freeing its HR team to focus on higher value activities, achieve legal and regulatory compliance, and eliminate paper waste.

"We saved approximately US$145,000 per year by eliminating the paperwork new hires needed to complete, which drives an increase in productivity," says the Radial HR information services manager. "This underscores the significance of a digital approach and the ongoing value of Adobe."

The Radial HR director said the company chose Acrobat Sign Solutions because it had all the features that were needed, easily integrated with Workday, and was the most cost-efficient option. "The combined solutions cost five times less than trying to combine Workday and other products we explored."

> "
> We saved approximately US$145,000 per year by eliminating the paperwork new hires needed to complete, which drives an increase in productivity.
>
> HR Information Services Manager, Radial

- Allowing signees—from recruits to current staff—to send, sign, and return agreements from any browser or device, including the one in their pocket, without needing to download or sign up for new apps

- Uploading and storing signed documents automatically, with visibility into every step and a full audit trail for all parties to follow
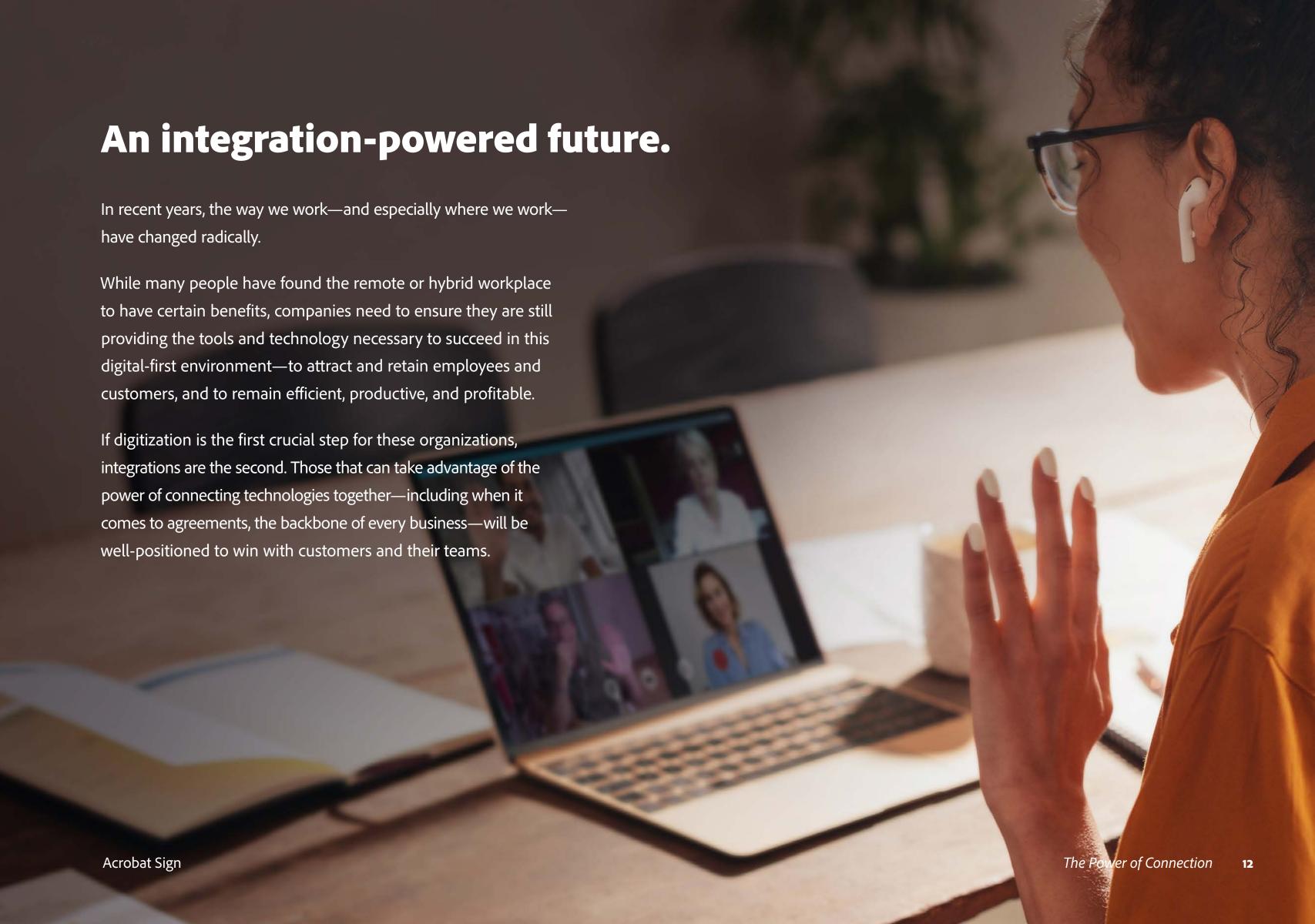
Without Acrobat Sign Solutions with Workday, a hiring manager has to take so many steps just for an offer letter. Combining information manually from multiple systems requires time and resources, and it's agonizingly iterative. What if a candidate forgot to check a box or sign a specific page? How many different forms and platforms must be involved? How many emails need to be exchanged?

"In the world we live in today, that is not the first experience you want your candidate to have with your company," says Jenny Ho, senior product marketing manager at Adobe. "With Acrobat Sign Solutions for Workday, you have the ability to track the document in its entirety, streamlining the process and cutting down on contact cycles."

Affording the ability to manage so many HR processes within one system, Acrobat Sign Solutions for Workday dramatically reduces the steps involved in recruiting and onboarding.

"This is the age of digital transformation and seamlessly great first-use experiences, which streamline all your manual processes into smart digital workflows," says Ho.

An integration-powered future.

In recent years, the way we work—and especially where we work—have changed radically.

While many people have found the remote or hybrid workplace to have certain benefits, companies need to ensure they are still providing the tools and technology necessary to succeed in this digital-first environment—to attract and retain employees and customers, and to remain efficient, productive, and profitable.

If digitization is the first crucial step for these organizations, integrations are the second. Those that can take advantage of the power of connecting technologies together—including when it comes to agreements, the backbone of every business—will be well-positioned to win with customers and their teams.

Adobe can help.

We partner with leading companies—such as Microsoft, Salesforce, and Workday—so you can easily add Adobe Acrobat Sign Solutions to the systems, processes, and applications your organization already uses. Boost productivity and maximize efficiency by integrating e-signatures into your most important software, and make signing documents a seamless part of your business workflows. With Adobe's suite of digital solutions, managing your daily documents has always been simple. Now you can get even more with Acrobat Sign Solutions, thanks to its easy-to-use features and intuitive integrations with the applications you use most.

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