Adobe Sign

Automate Document Workflows with Adobe Sign.

So much more than signature processes. It's drag and drop simple to automate every task from start to finish without coding.

No matter how efficient the organization, when a document workflow requires a physical signature, everything slows down—workers scramble to locate the latest documents, get approvals and signatures from others, and then deliver and archive the final documents.

It's little wonder that organizations worldwide have embraced electronic signatures. Many leading organizations such as TiVo, Ricoh, AmerisourceBergen, Jaguar Land Rover and KLM are transforming document and signature processes with Adobe Sign. Using workflow automation, these organizations are processing sales contracts, new hire forms, lease agreements and work orders faster and more efficiently.

The business results are profound:

- TiVo's advanced television entertainment business eliminated printing and storage of 99% of its contracts.
- New employees at Ricoh are now able to complete their onboarding documentation in less than 15 minutes.
- AmerisourceBergen shortened signature turnaround time on product return authorizations from up to two months to three days.

Today, the biggest question isn't whether to adopt electronic signatures or automate processes—it's how to do it quickly and in compliance with business requirements. With Adobe Sign, you can automate your document processes using easy-to-understand, easy-to-implement workflow design solutions without disrupting your business—and no coding is required. Adobe Sign is an Adobe Document Cloud solution that manages the signing and document routing processes from end-to-end, integrates easily with existing business processes and provides an immediate return on investment.

"Leveraging the automation in Adobe Sign, we were able to remove days from our contract cycle time while increasing our control and visibility into the workflow and establishing clear audit trails for our internal records."

LARRY DENNY
Vice president and associate general counsel, TiVo

"The versatility of Adobe Sign supports e-signature requirements across our entire organization. Adobe has transformed the way we work, improving efficiencies across many important operational areas, including procurement and human resources."

GEMMA GERVASINI
Finance manager, European operations, Kantar IT Partnership

Transform document workflows.

With Adobe Sign, business users—such as operations managers, analysts and departmental administrators—can use visual design tools to quickly and easily build, test and refine workflows themselves without coding. Anyone in your organization can tailor and automate workflows without being a technical expert.

Only Adobe Sign offers workflow customization solutions that span the full range of touchpoints, letting you automate processes and speed business across your entire organization.*

- **Web application**—Use the Workflow Designer tool in Adobe Sign to build reusable workflow templates that automate document signing and routing steps.
- **Enterprise applications**—Work with prebuilt integrations to add signature workflows to enterprise applications, including popular systems of record like Salesforce and Workday.
- **Self-serve web applications**—Use Adobe Sign Advanced Workflows to create online and self-serve web applications that automate customer or employee business processes from end to end. Examples include: sales contract management, vendor onboarding and new hire onboarding.

Ensure repeatable, error-free signing processes.

With the Adobe Sign web application, users can easily send documents for signature, manage and track the process, and archive signed documents. Administrators can use the Workflow Designer tool to create reusable workflow templates to help ensure repeatable, error-free results—helping users avoid common mistakes, such as missing a required signature or using an outdated document.

Workflow Designer lets you design and manage workflow templates easily with an intuitive drag-and- drop editor. It's easy to specify:

- Documents to be included in an agreement
- Form fields to be prefilled by the sender
- Characteristics of the participants—including custom names like 'department head'
- Predefined recipient roles—including signer, approver, acceptor, delegator, form filler, and certified recipient.
- Predefined recipient groups—so any one person from a group can take an action
- Agreement expiration or password options
- Instructions for your users

"We pride ourselves on being an innovative tech company, so this manual process didn't fit with our core values. With Adobe Sign, we're leveraging templates to send paperwork in just a few clicks. The workflow is easy enough for all employees to pick up immediately, while still giving me the functionality to build out advanced use cases and scale to our needs."

MATT MAIMONI
Talent operations manager,
Foursquare

"Our previous manual processes involved a lot of scanning and emailing documents for signatures, reviews, and approvals. Sales representatives now use automated workflows to draft and manage quotes and contracts directly through Salesforce using Adobe Sign."

AMY ROY
Vice president of sales operations
Ceridian

Add e-signing workflows to your existing enterprise applications.
Adobe Sign lets you build e-signing processes into your critical enterprise applications using prebuilt integrations and APIs, including Salesforce, Workday, Microsoft Dynamics CRM, SharePoint, Ariba, Apttus, NetSuite and SAP CLM. Users can prepare, send, track and manage the e-signing of business-critical documents directly from the enterprise applications they work in every day. With Adobe Sign, you can customize your contracting, sales or procurement processes to meet the demands of your business—without additional solutions or expensive custom programming.

For example, Salesforce integration allows sales teams to view, draft and send contracts for signature directly from Salesforce or the Salesforce1 mobile app. Easily create custom agreement templates that let salespeople select the most current version of an agreement prepopulated with customer information, and then send it out for signature with a few quick clicks. Adobe Sign has been the #1 e-signature service in the Salesforce AppExchange since 2006.

Build your own self-serve business processes.
Adobe Sign Advanced Workflows lets business analysts and administrators create standalone, custom web applications for customers, business partners, or employees. Use it to create specialized solutions across the enterprise, such as NDAs, contract management, compliance documentation, application requests, vendor onboarding and more. Then simply give your users the new URL to allow self-service access to the new process.

With Advanced Workflows, organizations have the flexibility to choose the processes they want to transform. You can start with automating one process, implement it right away, and then expand to other processes or departments over time. The standalone solution can be extended to serve every department, regardless of their system of record—keeping everyone in the organization productive.

Use Advanced Workflows to:

- Create HTML forms to qualify new requests and send the right document package.
- Use conditional logic to route each request correctly and trigger next steps automatically
- Configure user-based rules and permissions for workflows and documents
- Create dashboards to manage signed documents and deliver business reports
- Quickly integrate with back-end systems

Case study: Nondisclosure agreements.
To illustrate how Adobe Sign offers flexible tools to streamline your signing workflows, we'll look at the nondisclosure agreement (NDA) process in three business scenarios.
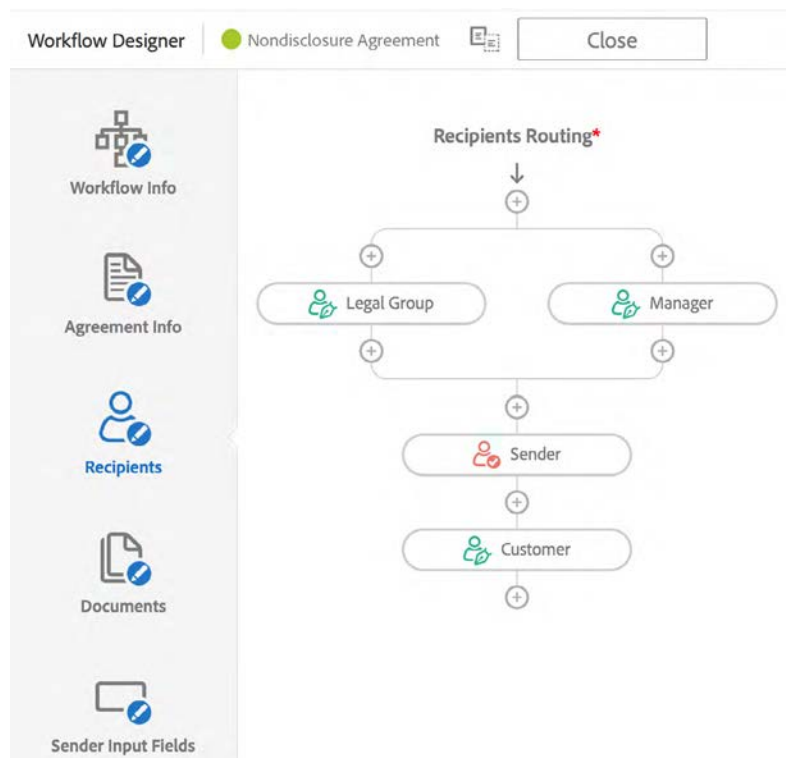
> *"By giving sales representatives self-service access to pre-approved NDAs through Adobe Sign, agreements are completed and processed significantly faster."*
>
> **CONNIE BRENTON**
> Director of operations and chief of staff, legal department
> NetApp

NDA workflow template: Workflow Designer in the Adobe Sign web application.

Many legal departments have a standard NDA form that requires two internal approvals—the department manager and the legal department representative—before it can be sent to third-party agencies and contractors for signature.

Use the Workflow Designer drag-and-drop interface to easily create an automated NDA workflow template.

Using the Workflow Designer drag-and-drop interface, legal departments can simplify this process by creating an automated NDA workflow template. After defining the workflow steps, administrators define agreement details, such as instructions for the signer and expiration terms; specify the list of recipients, including approvers and signers; select the document template to be included; and then specify form fields to be prefilled by the sender.

Users work with the most up-to-date version of the NDA form, and then click Send to automatically send it out for internal approvals.

To use the new automated NDA workflow, users simply log in to the Adobe Sign web application and select the NDA template. The most up-to-date version of the NDA form is attached automatically. The user completes the form and clicks the Send button to begin the process. The form is routed for internal approvals first, and then to the outside party for final signature. Throughout the process, the user can track progress in real time and send reminders to speed the signing process.
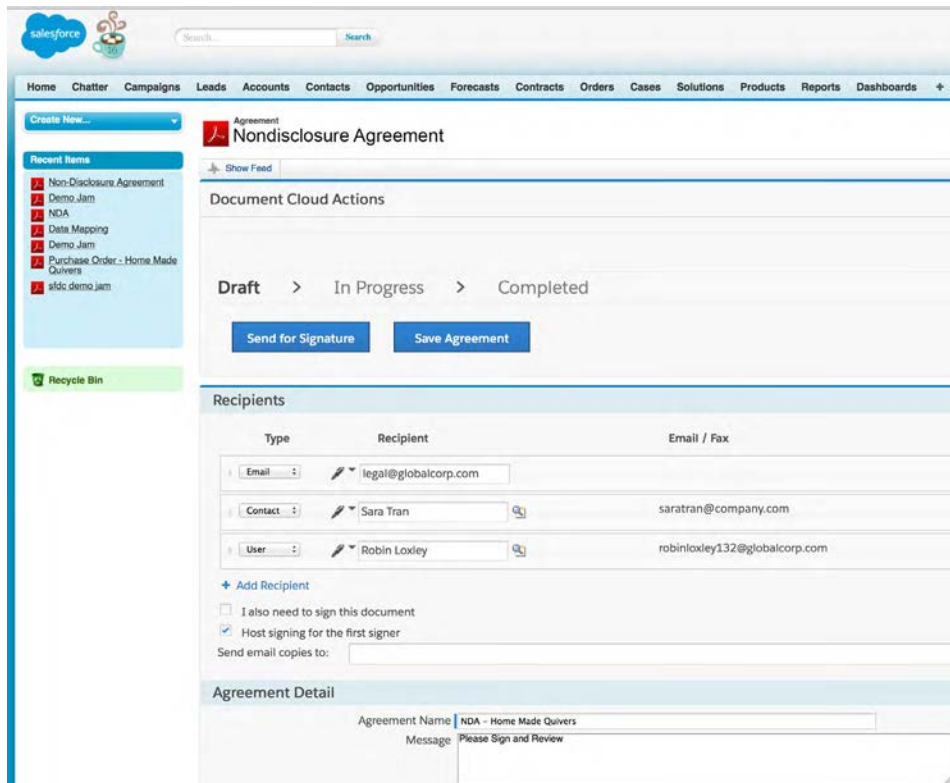
With the new automated workflow template, employees can quickly and easily complete an NDA process—sending the right document to the right person at the right time, without frustration or delay.

NDA workflow template: Salesforce.
Many sales teams manage every step of their sales and customer relationship processes in Salesforce. The workflow runs smoothly until an NDA document needs to be signed. Team members spend cycles locating the appropriate NDA form, getting the right people to approve it, reminding the customer to sign it, and then archiving it for compliance purposes. This manual process is prone to human error that can delay or derail business.

Sales teams can streamline their NDA processes using the turnkey integration between Salesforce and Adobe Sign. Because the prebuilt integration includes agreement templates, it's easy for a Salesforce administrator to attach a standard NDA that can be used by all team members.

The sales team can now initiate the NDA workflow with a click of a button in Salesforce. The NDA documents are automatically prepopulated with data pulled directly from Salesforce, such as the sender's name, title and address. Adobe Sign routes the NDA for signature and tracks the progress in real time. Once all approvals are complete, the data captured from the NDA flows seamlessly back into Salesforce.

Users can send out the NDA for signatures directly from Salesforce.

Self-serve NDA web application: Advanced Workflows.
Many legal teams in large, global organizations maintain multiple NDAs for different departments, in different languages, with different approval processes. Legal teams can simplify the NDA process with a self-serve solution. With Adobe Sign Advanced Workflows, they can build a custom, standalone application for their NDA workflows.

Nondisclosure agreement

Complete the form below to select the right NDA form for your business region and send it to the right people. Once you submit the form, it will be routed for signature automatically. You can track this request through the Workflow Dashboard or by viewing the various alerts sent out by the application.

Summary   0 Comments

Date

12/22/2015

Geography *
-- Select one --

Country *
-- Select one --

Language Preference *
-- Select one --

Company
Company name

Your Name
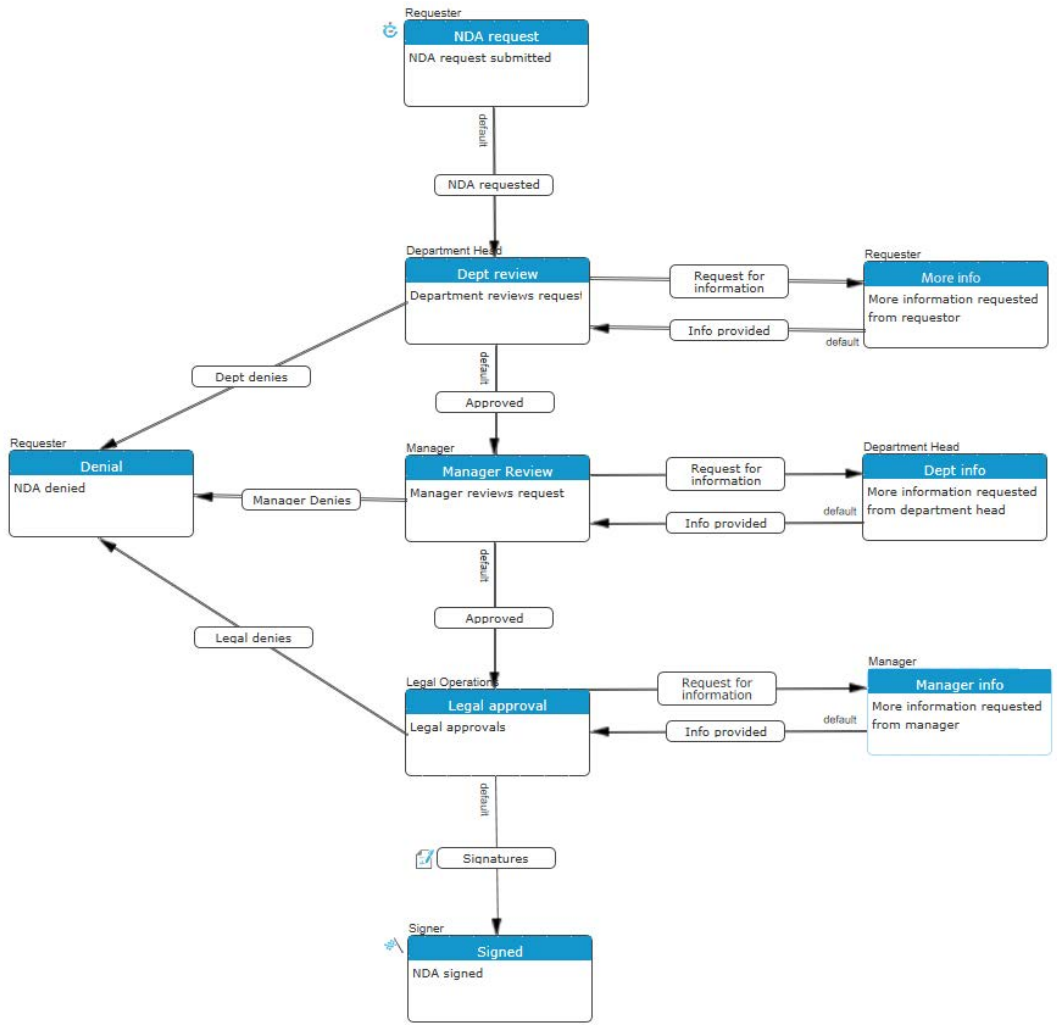Your name

Signer Info

Signer 1 Name
The signer's name

Signer 1 Email *
The signer's name

Submit

To create NDAs for different geographies, business units and languages, use Workflow Designer to build a form with conditional logic fields.

Requester
NDA request
NDA request submitted

default

NDA requested

Department Head
Dept review
Department reviews request

Request for information

Requester
More info
More information requested from requestor

Info provided

default

Dept denies

default

Approved

Requester
Denial
NDA denied

Manager
Manager Review
Manager reviews request

Request for information

Department Head
Dept info
More information requested from department head

default

Info provided

Manager Denies

default

Approved

Legal denies

Legal Operations
Legal approval
Legal approvals

Request for information

Manager
Manager info
More information requested from manager

default

Info provided

default

Signatures

Signer
Signed
NDA signed

Advanced Workflows automatically routes the NDA request as it is approved or denied until it is approved by all internal parties, and then sends it out for signature.

Using the Advanced Workflows intuitive visual workflow design tool, the legal team can define roles, assignments and stages, and specify workflow options to allow managers and legal operations to approve, decline or request additional information.

With a self-serve NDA solution, legal team members from around the world can simply select a link on their intranet to start the new automated NDA process. After filling out the required geographic, business unit, department and language information, they can immediately initiate an NDA request with the right information and approvers. Advanced Workflows automatically routes the NDA request as it is approved or denied until it is approved by all internal parties.

Once the request has been approved, Adobe Sign automatically generates the NDA and sends it out for signature. Once the NDA has been signed, the appropriate parties are notified and the signed NDA is automatically archived and stored according to the defined process.

With Adobe Sign Advanced Workflows, legal teams can quickly and easily create a customized, dedicated, self-serve workflow. Automating a previously complex and error-prone process increases productivity—allowing organizations to complete business faster.

Work with the digital document leader.

From the global leader in secure digital document solutions for more than 20 years, Adobe Sign offers powerful, easy-to-use workflow automation solutions to help organizations take electronic signatures to the next level. No matter how simple or complex your e-signing workflow, Adobe Sign has your organization covered—from customizing e-signature templates—to using prebuilt integrations with your enterprise application—to building standalone, self-serve web applications.

With the Adobe Sign flexible workflow options, you can move your signature-based, automation projects to the short list. Adobe's agile, accessible workflow solutions give you the tools you need to keep your business moving—automating critical signature-based processes, boosting efficiency and removing unnecessary friction.

To learn more about how Adobe Sign can benefit your organization, contact your Adobe sales representative today.

For more information.
http://adobe.com/go/adobesign

* Purchase of the Adobe Sign Enterprise plan is required for all workflow automation solutions described in this brief.