

# The e-signature advantage.

How to accelerate sales with 100% digital signing experiences.



# The next step in optimizing sales processes.

Add Adobe Sign to Microsoft Dynamics 365.  
It's fast. It's easy. It works.

Is your sales team spending more time on administrative tasks—like chasing down approvals or following up on signature requests—than they are actually selling? Help them focus on sales by integrating Adobe Sign with [Microsoft Dynamics 365](#). Using the same customer relationship management (CRM) system, they can add legally binding, globally compliant e-signatures with automated workflows to all their proposals, quotes, and contracts.

According to recent Forrester studies,\* integrating all signing and automated workflows with Adobe Sign can save organizations:

- **An average of 1.5 hours** and US\$6 per signing transaction
- **570 hours annually** for IT administrators
- **US\$675 savings per user, per year**, from reduced paper use and shipping

\* "[The Total Economic Impact of Adobe Sign](#)" and "[The Total Economic Impact of Adobe Acrobat DC](#)," commissioned studies conducted by Forrester Consulting on behalf of Adobe, September 2019.

From routing to secure storage, the Adobe Sign process is seamless, easy, and fast. When you integrate Adobe Sign with the sales processes your teams use every day, you'll realize all these benefits and more:

- 🕒 Get to revenue faster and improve win rates.
- 😊 Deliver an all-digital customer experience.
- 🔍 Gain visibility into each contract's signature status.
- 🔒 Reduce legal, security, and compliance risks.
- 💰 Maximize your Microsoft investment.
- 📱 Close deals anywhere, on any device.
- 🗑️ Minimize time-wasting administrative tasks.
- 📄 Reduce costs associated with paper, printing, and storage.



# From prospecting to renewal.

Use Adobe Sign across the entire sales lifecycle.

## Prospect

- New account/customer application

## Qualify

- Nondisclosure agreement (NDA)
- Terms and conditions
- Internal proposal/quote approval

## Close

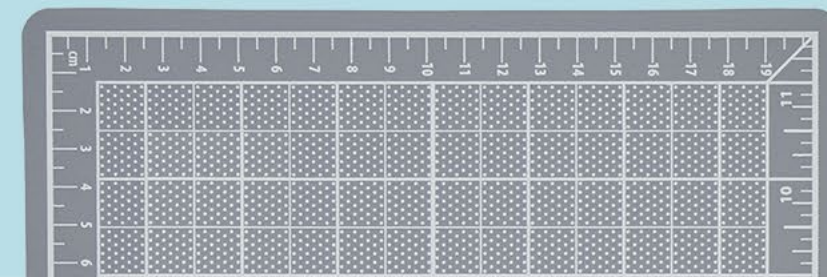
- Sales contract
- Quote or proposal
- Financing application
- Loan/lease agreement

## Maintain

- New customer onboarding form
- Change order
- Project sign-off
- Receipt of goods/services
- Services agreement

## Renew

- Renewal agreement
- Contract addendum
- Statement of work (SOW) or insertion order





# Reduce legal and compliance risks.

Human error is a risk in any organization. It can be too easy to accidentally send an outdated version of a contract or mistype pricing on a quote. With Adobe Sign, you can replace manual processes with a 100% digital solution, minimizing costly legal and business risks.

- Validate the recipient's name, company name, and job profile using integration with LinkedIn Sales Navigator before sending the contract for e-signature.
- Automatically add data from Dynamics 365 into [contracts](#) you send for e-signature—and even capture data from the signed agreement back into the customer record.
- Create workflows that follow your specified business rules to help ensure the right information and the right documents are used every time.
- Reduce legal risk by maintaining a complete audit trail for every transaction.
- Rest assured your documents are tamper-evident thanks to a digital seal that helps ensure contract integrity.

# According to recent research by Aberdeen,<sup>†</sup> businesses that deploy e-signatures are:

**2x**

more likely to have confidence in documents for completing business

**80%**

more likely to have high customer satisfaction

**2x**

more likely to complete signatures for legal contracts without IT assistance

**28%**

more likely to see increased revenue

<sup>†</sup> "E-signatures & IT Operations: Working Together to Boost Overall Performance for Your Business," Aberdeen, January 2020.



## CASE STUDY

# Lifetime Training



# Cutting contract-processing time by 80%.

### Lifetime Training

Bristol, United Kingdom

Learners trained annually: 25,000

For more than two decades, Lifetime Training has delivered training and education programs that sharpen professional skills and support business growth. Today it is one of the UK's leading training providers, with 25,000 learners per year.

### Challenge

Because the company's business involves government-funded apprenticeships, the introduction of a new law, the Apprenticeship Levy, required 200 to 300 additional contracts per month to be processed. Lifetime's contract creation process had been long and cumbersome. The company needed to rethink how it could deliver a better customer experience to clients who expect a virtually instant response.

### Solution

Lifetime Training deployed Adobe Sign integrated with Microsoft Dynamics 365 Sales to help deal with this extra workload. This integration allowed users to send, track, and sign contracts directly from the Dynamics 365 CRM system—anywhere, anytime, on virtually any device. Dynamics 365 data is pulled directly into the contract in Adobe Sign, minimizing data entry and errors. Once the contract is digitally signed by the employee, the finalized contract, including completed data, is filed back in the Dynamics 365 CRM system. With Adobe Sign, contract processing to meet Lifetime's expanded requirements became efficient, compliant, and highly professional, which created a much better experience for their customers.

### Results

Using Adobe Sign with its [digital workflow](#), contracts can be prepared and distributed electronically in just 30 seconds, where they previously took up to 5 minutes. That's a time savings of 90%. Contracts that had previously taken an average of 5 days to process now take as little as 24 hours to be completed and returned—an additional time savings of 80%. Error rates on contracts, which had been up to 40% when Lifetime used paper, are now lower than 5% with the use of electronic contracts.

# Adobe × Microsoft: Partnering to accelerate your digital transformation.

Adobe and Microsoft are committed to helping organizations with their digital transformation. Our combined solutions drive business efficiencies and deliver end-to-end digital experiences for millions of users around the world.

Find out more about how we can help your organization take the next step in its digital transformation journey.

Contact us



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