

Streamlining legal workflows with Adobe Sign



"By giving sales representatives self-service access to preapproved NDAs through Adobe Sign, agreements are completed and processed significantly faster."

Connie Brenton, director of operations and chief of staff, legal department, NetApp

The legal team plays a crucial role in any organization. That's why you've decided to deploy *Adobe Sign*, part of Adobe *Document Cloud*, to streamline your document approval process and gain more control over signed agreements and their associated data. But finding the right solution is only the first step. The key to success is how you deploy it within your organization.

Adobe Document Cloud eSign services speed up and simplify processes like these:

- ▶ Approval workflow
- ▶ Contract drafting
- ▶ Third-party legal review
- ▶ Collaboration

Determining exactly what challenges your legal department is trying to solve will help you plan an effective launch. For example, find out if your team currently spends too much time asking questions such as the following:

- Where are our standard agreement templates?
- Is this the most recent agreement signed with Company x?
- Where is the previous agreement signed with Company y?
- Are we allowed to accept these terms for this type of agreement?
- Who is authorized to sign this agreement on behalf of our company?
- Can someone else sign this urgent agreement if our CEO is on vacation?

Once you identify the specific issues your organization is facing, you can set up templates and workflows in Adobe Sign to resolve them. To optimize the service for your unique environment, consider taking the following steps.

Step 1: Define approval templates and workflows

- **Set up templates:** It is imperative to define the agreement templates that can and should be used in your new *e-signature* system. They may include templates for different jurisdictions, risk and liabilities or financial thresholds. Having a one-size-fits-all agreement usually results in protracted negotiations if the terms are not fair to both parties. Create new templates, if needed, and discard outdated ones. Label templates clearly, so it's easy for users to select the right one for their agreement. And don't forget to add branding to your templates so customers and partners always know what company they're working with.

“Adobe Sign aligned perfectly with our business. Since moving to a web-based contracting system, we’ve seen faster return rates and reduced costs, which makes a positive impact on our profit.”

Matthew Townson, information and communication technologies manager, GT LAW Solicitors

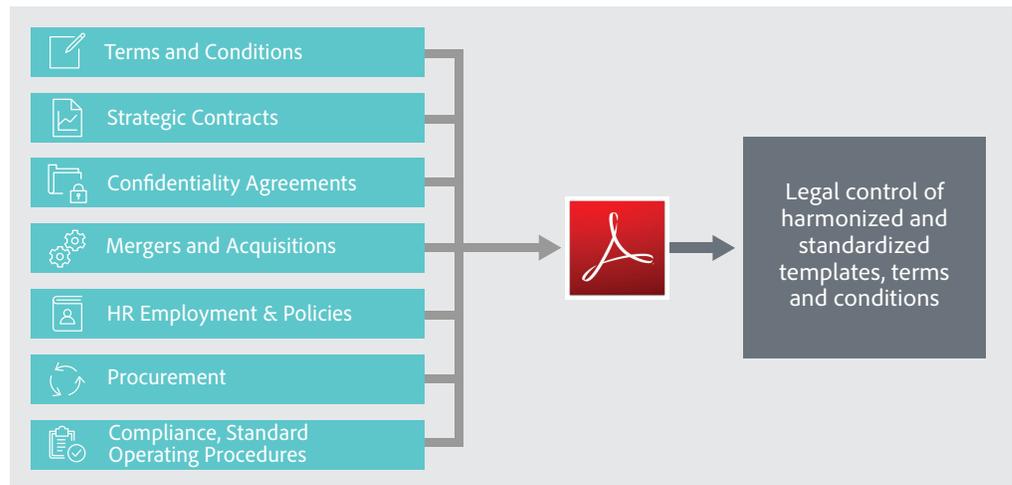
For more information

To learn more about Adobe Sign in legal environments, read the *Adobe Document Cloud ESIGN Act white paper*.



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- **Define approval workflows:** Determine the approval workflows for different types of agreements. For example, some agreements may require manager-level approval, while others need only executive approval. And often, those signatures must be obtained in a specific order. Define the approval workflow for each type of agreement up front, so all workflows can be automated in Adobe Sign. This will enable a swift transit of the documents through the approval channels in your organization.

Adobe Sign also lets you track where a document is in the workflow at any time. You can allow a change in authorized signer, if necessary, to get the document signed more quickly. A best practice is to identify several authorized people and set up a group list. The initiator can use the group list to swap one signer for another to avoid delays if a key signer is out of the office.

Step 2: Plan ahead

- **Set short-term and long-term goals:** Think about how you want to use Adobe Sign across your organization now and in the future. Do you have a specific need in one business unit or for all contractual documents throughout the organization? A best practice is to pilot the service in one workflow first and then roll it out across the organization. If you want to integrate the service with your in-house applications such as HR, finance and procurement systems, you can use the APIs to enable *e-signatures* in your existing systems. It may be worth getting your IT team involved at this stage.
- **Optimize for global, regional or departmental needs:** Due to *differing laws and regulations*, standardization across the globe can be difficult. Figure out which processes are global and which are regional or unique to a specific business unit. Knowing this will enable you to standardize the approach, in whole or in part, wherever possible.

Step 3: Test and deploy

- **Test your deployment plan:** Choose a particular department or workflow and launch a pilot to test Adobe Sign in your environment. By starting with a limited deployment, you can identify template, workflow or technology issues early. Then develop a standardized deployment process for subsequent business units or regions based on key learnings. This approach enables rapid new deployments without reinventing the wheel every time.
- **Partner with your users:** Prior to each deployment, work closely with the teams that will be using the services to establish their unique goals and objectives. Develop a plan that promotes a quick, realistic adoption and leverages previous successful deployments. Use the team’s specific goals and objectives as milestones and measurements of success.
- **Train and support users:** Deployments require effective communication, training and support for success. Start communicating with users early about how their current process will change, and be sure to highlight how much easier their new workflows will be. Create clear, straightforward training materials that are easy for users to access and understand. Also, offer them direct support to ease the transition.

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