Implementing Adobe Sign
A best practices guide

May 2016
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Transform your business processes with electronic signatures</td>
</tr>
<tr>
<td>4</td>
<td>1. Define your objectives and business goals</td>
</tr>
<tr>
<td>6</td>
<td>2. Build your implementation team</td>
</tr>
<tr>
<td>8</td>
<td>3. Select, prioritize and transform business processes</td>
</tr>
<tr>
<td>12</td>
<td>4. Develop your implementation plan</td>
</tr>
<tr>
<td>17</td>
<td>5. Implement your project</td>
</tr>
<tr>
<td>18</td>
<td>Expand on your success</td>
</tr>
<tr>
<td>19</td>
<td>Looking forward</td>
</tr>
<tr>
<td>20</td>
<td>Resources</td>
</tr>
</tbody>
</table>
Transform your business processes with ELECTRONIC SIGNATURES.

With Adobe Sign, an Adobe Document Cloud solution, you can automate signing and approvals across a wide range of departments and business processes—helping your organization reduce processing time from days to minutes, deliver great customer experiences, and improve productivity and mobility.

Adobe is committed to the success of your implementation project. As a trusted business partner, we provide the services of both a Customer Success Manager (CSM) and an onboarding specialist to support you throughout your project. In this guide, you will find everything you need for a successful e-signature implementation—step-by-step instructions and Adobe best practices, plus additional resources.

Adobe Sign is helping us streamline internal and external processes across the company, making it one of the most value-added products we’ve ever seen at TiVo.

LARRY DENNY
Vice president and associate general counsel
TiVo
1 Define your objectives and business goals

1a. Define project objectives
Specify what you are trying to achieve, how will you will achieve it and how you will define success for your project. Start by reviewing why your organization is implementing electronic signatures (e-signatures).

What needs and challenges did you identify when evaluating e-signature solutions? Examples include:

- Business is slowed or delayed waiting for physical signatures
- High shipping and mailing costs of documents to secure signatures
- Delays in obtaining approvals and signatures due to travel

Where is business delayed due to paper-based, manual processes? Examples include:

- Slow recruiting, hiring and onboarding due to manual process of signing and returning paperwork
- Legal reviews and approvals slowing business
- Nondisclosure agreement (NDA) processes burdened by long review and approval cycles

Where have delays in getting signatures resulted in lost opportunities? Examples include:

- Sales lost or delayed due to challenge of getting signatures
- Longer than desired quote-to-cash process
- Procurement delayed while waiting for required approvals and signatures

Examples of project objectives:

- Reduce the time to process contracts by 75%
- Ensure 24-hour turnaround on reviews and approvals of contracts with mobile e-signing
- Revamp NDA process from Salesforce; require no more than two clicks to generate and send a standardized contract prefilled with accurate data

Best Practice
Not sure where to start?

- Use your Adobe onboarding specialist as a resource to help you define your project objectives.
- Visit Adobe Sign: Ask Me Anything Webinars.

Resources
For more ideas for project objectives and to see how leading organizations are using Adobe Sign, review the business processes in the Adobe Sign customer showcase.
1b. Review business processes

To get an idea of what business processes can be transformed, review how leading companies are using e-signatures. To see how Adobe is using Adobe Sign to streamline its own internal workflows, read these customer stories: HR, Legal and Procurement. This diagram shows three common areas where e-signatures are used: sales, employee and procurement business processes.
## Build your implementation team

Your onboarding specialist will help you select the members of your implementation team—from your organization and Adobe. Depending on the size of your organization, there may be more than one person in each role, one person might hold several roles, or they may overlap.

### Customer roles and responsibilities

<table>
<thead>
<tr>
<th>Customer role</th>
<th>Responsibility</th>
<th>Pairing with Adobe</th>
</tr>
</thead>
</table>
| Executive sponsor (CIO, VP of sales, VP of HR, VP of procurement) | Ultimate point of escalation:  
  • Drives the vision, directs strategy and gains organization buy-in for the overall project  
  • Attends quarterly business review (QBR) meetings and agrees on next steps  
  • Resources the team, identifies the project manager and ensures success metrics are defined and tracked | Adobe executive sponsor |
| Line of business manager (VP, director, sr. manager of sales, HR, procurement) | Key stakeholder in defining business objectives:  
  • Ensures project team has resources and company support needed  
  • Ensures success metrics are defined and tracked | Adobe Customer Success Manager (CSM) |
| Project manager                                    | Works with key stakeholders to define business objectives  
  • Identifies and understands key business processes  
  • Develops implementation plan, and identifies and directs resources needed to deploy integration  
  • Gathers documents needed for rollout  
  • Drives day-to-day management of project including timeline and milestones  
  • Transitions to business as usual at end of implementation | Adobe Customer Success Manager, Adobe onboarding team |
| Support team                                        | Administers Adobe Sign, managing users and settings  
  • Identifies additional e-signature opportunities  
  • Triages any issues and provides answers to internal questions | Adobe Document Cloud support team |
| Technical implementation manager (if needed)        | Manages and deploys any API or other integrations or internal work needed to deploy Adobe Sign | Adobe onboarding team, Adobe solutions consulting team |
| Internal communication manager                      | Communicates with internal stakeholders | Adobe Customer Success Manager |

### Best Practice

Include owners of these areas on your team:
- Owners of the workflow for the targeted process
- Owners of documents that are targeted for e-signing and approvals
- Document processors involved in postsigning or approval
- Coordinators who interact with parties who will need to sign the documents
# Build your implementation team

## Adobe roles and responsibilities

<table>
<thead>
<tr>
<th>Adobe role</th>
<th>Responsibility</th>
<th>Pairing with customer</th>
</tr>
</thead>
</table>
| Executive sponsor                               | Ultimate point of escalation:  
- Maintains engagement with customer’s executive sponsor  
- Provides perspective on wider vision and strategy                                                                                           | Customer’s executive sponsor                                                           |
| Customer Success Manager                        | Primary point of contact at Adobe:  
- Assesses priorities and goals regarding the use and adoption of Adobe Document Cloud  
- Provides best practices recommendations and tips to drive adoption  
- Facilitates introduction of Adobe Solution Partners  
- Develops success plans  
- Presents product development road map  
- Gathers and champions your feature enhancement requests  
- Demos new releases of Adobe Sign                                                                                                               | Customer’s project manager and line of business manager                             |
| Onboarding specialist                            | Conduit to any additional resources needed during start-up phase:  
- Ensures you have the resources and training to enable the business process transformation  
- Provides support during initial implementation through configuration and customization of your Adobe Sign account  
- Holds regular, twice-weekly virtual office hours to answer questions  
- Connects you to an onboarding email series that provides answers to common onboarding questions, best practices and links to support                                                                 | Customer’s project manager and technical implementation manager                       |
| Solutions consulting team and extended services (fee-based services) |  
- Adobe Professional Services—Provides solution architects to help you create, develop, deploy, customize or optimize your implementation. Packages and custom services are available in consulting, development and education. For more information, contact your CSM.  
- Adobe Extended Services—Provides a comprehensive set of proactive support services. For more information, contact your CSM.                                                                                     | Customer’s technical implementation manager                                           |

---

**Best Practice**

Maximize your investment with Adobe services that are included with your subscription. For more information, read the Adobe Document Cloud Customer Success datasheet.
3a. Select and prioritize business processes

Review your project objectives and targeted lines of business (step 1), and then use them to generate a list of related business processes. If you have already identified the process you want to transform, skip to step 3b, "Transform business processes."

Most processes fall into one of these general categories:

- **Quick win**—A straightforward business process that can be quickly and easily transformed
- **Major opportunity**—Significant organizational reward; good targets for the second phase of your project
- **Special effort**—Deserving of further review to determine implementation complexity and organizational importance
- **Low yield**—Best reexamined after progress in other categories

Once you have a list of business processes, you can prioritize them to determine phasing and targeting. Start with a quick win—an important business process that is easy to implement.

**Best Practice**

- Start with a quick-win to allow you to work with a small team with focused goals, helping to ensure the first phase of your project can be rolled out quickly—demonstrating success, generating excitement and delivering ROI.
- Identify an important process that is valuable to the business and straightforward to implement. For many companies, NDAs, sales or HR onboarding are a good place to start.

We can complete contracts in minutes and meet deadlines that would have been impossible without leveraging this type of technology.

---

**CONNIE BRENTON**

Director of operations and chief of staff, legal department

NetApp
3b. Transform business processes

The next step is to transform your current business process workflow into a digital workflow. This is a great opportunity to improve your overall process design. Below is an example of how you can dramatically increase the efficiency of your workflow—saving time and resources.
3 Select, prioritize and transform business processes

3b. Transform business processes

1. Document current paper-based workflow
Start by evaluating and then diagramming the current paper process—identifying the documents, actions, stages and delivery mechanisms.

2. Map out your digital process
Using the paper business process workflow diagram, reevaluate the existing process and look for ways to achieve efficiencies.

3. Make documents e-sign ready
Digital documents can simplify the user experience by preventing errors and minimizing re-work. Setting up required fields, format specification, tool tips and data validation are great ways to transform your digital document and improve the user’s signing experience. Consider redesigning your documents and forms with selective use of color, layout, reorganization, fonts and data entry fields.

Best Practice
As you document the current workflow, keep track of the time and resources it requires, and where there are issues. You will use these facts later to determine the success criteria for your implementation.

For guidance on transforming workflows, read Migrating workflows from paper to digital.

Resources
• For detailed information on transforming workflows, see the best practices guide Migrating workflows from paper to digital.
• Your Adobe onboarding specialist can help you identify ways to optimize your digital processes.
• For step-by-step instructions on setting up templates that create forms with easy-to-use fillable fields, see this tutorial on how to create forms with text tags.
• For additional examples of the digital transformation of customer workflows, visit the Adobe Sign customer showcase.
3c. Identify success metrics

You established your project objectives in step 1. It is critical to define the metrics that will be used to determine the success of your project.

- Start with the time and resources that were consumed by the process prior to digital transformation. Which resources were pain points in the process? Which ones are targeted for reduction with e-signatures?
- What are the most important elements of your business processes that owners and participants want to transform? Examples include reducing time or cost to complete, overall percentage of documents transitioned to digital and so on.
- To have the most impact, identify metrics that have the most importance to the targeted audience.

Here are some examples of success metrics:

- Accelerated turnaround time
- Number of signature processes transitioned to digital
- Cost and resources reduction, including shipping and postage costs
- Reduction of quote-to-invoice time by x%
- Reduction of time to onboard new employees or customers by x%

Best Practice

When you documented your paper-based workflow in step 3b, we suggested keeping track of the time and resources it required. Refer to this information as a starting point for your success metrics.

Resources

This tool can help you determine possible success metrics for your organization:

- Resource Saver Calculator
4 Develop your implementation plan

4a. Implementation strategy

Your implementation plan should specify the phasing, schedule, scope, audiences and/or geographies of the rollout. You will also create plans for communications, training and end-user support.

Integrating with critical business systems

If you are integrating with key business systems such as Salesforce, Workday, Microsoft Dynamics CRM, Microsoft SharePoint or Apttus, you should involve your IT team at this stage.

Once you have identified which business system integrations are in scope, work with your onboarding specialist, CSM and partners to create the detailed plan and timeline for these systems.

Best Practice

If you are integrating to a proprietary business system or want to build a custom application with integration to Adobe Sign, explore using the Adobe Sign API to build a variety of different integrations. For more information, see Adobe Sign API Guide.

Resources

- To find out how to use the Adobe Sign API, see Adobe Sign API Guide.
- To learn more about implementation strategies, read Creating an Effective Deployment Strategy for Adobe Sign.
- To learn about implementation strategies of leading companies, review customer success stories and Adobe success stories: HR, Legal and Procurement.
- View the list of business system integrations Adobe Sign supports today. For more information, consult the Adobe partner integration guides.
4 Develop your implementation plan

4b. Communication plan

The goal of the communication plan is to generate excitement about the move to e-signatures and to ensure everyone in the organization knows how it will affect their workflows.

Identify target audiences

Begin by identifying the target audiences you need to communicate with and the most effective communication channel for each audience.

Communication channel recommendations for typical audiences

| Internal          | Executives       | • Face-to-face presentation  
|                  | Legal            | • Face-to-face presentation  
|                  | Users            | • Training webinar  
|                  |                 | • Email  
|                  |                 | • Intranet documentation  
|                  |                 | • Weekly drop-in call  
|                  |                 | • Lunch and learn  
|                  |                 | • Internal social media: Chatter, Yammer and so on  
|                  | Signers/customers | • Newsletter email  
|                  |                 | • FAQ page on website  
|                  | Partners/subsidiaries | • Training webinar  
|                  |                 | • Email  
|                  |                 | • Weekly drop-in call  
|                  |                 | • Lunch and learn  
|                  | Banks*           | • Face-to-face meeting  
|                  |                 | • Official communications to go paperless  

Best Practice

- Follow the recommendations in Creating an effective deployment communication plan.
- Create an elevator pitch about why your organization is moving to e-signatures. Concisely explain the project, identifying the benefits and explaining the risks and costs of maintaining manual signature processes. This pitch can be reused in almost all communications.

Resources

- For more details on developing content, read the best practice guide Creating an effective deployment communication plan.
- For more information on e-signatures, visit the Adobe Sign website and Adobe Sign FAQ.

* If using Adobe Sign for automatic payment authorizations or direct debit mandates (UK)
4c. Training plan

Your training materials should provide users with a clear understanding of the overall changes to the business process, as well as how and why the new workflows will help speed your implementation project.

1. Train your program team

Your onboarding specialist offers joint training sessions for administrators and end users to get you started.

2. Identify additional audiences to train

Next, you will identify the audiences you need to train and determine the training resources these audiences will require.

3. Provide a variety of training resources

Help ensure that users can find help at any point during the project by providing a variety of training resources. FAQ, checklists and peer-to-peer sharing are great ways to preserve and reuse knowledge.

Get questions answered by your Adobe onboarding specialist

Your onboarding specialist hosts twice-weekly Adobe Sign: Ask Me Anything Webinars. Designed for you to ask questions, seek advice or get recommendations, you can drop in anytime to these open, virtual office hours.

Enhance your team’s expertise with Adobe Professional Services

Adobe provides expert services designed to help you develop your team’s skills and gain greater control of your implementation project. Educational resources are also available.

Best Practice

- Follow the guidelines in 5 steps to developing an effective training plan.
- Your Adobe onboarding specialists and CSMs can train a "super user" from your organization, and then this individual will train your internal users. This can help speed resolution to internal questions during implementation.

Resources

- On-demand training videos
- Adobe Sign online help
- Adobe Sign reference guides
- Best practice articles
- 5 steps to developing an effective training plan
- Adobe Sign: Ask Me Anything Webinars
- Quarterly best practice-focused webinars via email invitation
4d. Support plan for end user

The goal of the support plan is to provide timely responses to any issues or questions that may arise to ease the transition to the new technology. Include a broad range of self-service tools, as well as in-person support to handle different types of questions.

Adobe support

With Adobe Sign, you get how-to support designed to answer your critical questions via web, email, live chat and phone. Adobe Document Cloud provides industry-leading availability and support response times.

When you need additional support day or night, you can visit and participate in the Adobe Sign community forums:

- Access blogs
- Read FAQ
- Submit feature requests
- Connect with other customers to share best practices and lessons learned

Additional support options

Paid service offerings enhance and extend the support you already receive as an Adobe Sign customer. Our Extended Service for Adobe Sign customers provides a more hands-on, personalized relationship with Adobe for expertise in a complex environment and assistance for a multifaceted solution. For more information, contact your Adobe CSM.
4 Develop your implementation plan

4e. Integrated implementation plan: Putting it all together

Once your implementation approach, training, communication and support plans are in place, you will want to combine them into one comprehensive rollout plan. This integrated program schedule should include regular check-in meetings, milestones and metric measurements.

Best Practice

Assess and identify risks that may impact your implementation. Key risk management steps are:

• Identify risks—Brainstorm all potential project risks.
• Assess risks—Prioritize risks based on impact.
• Develop a risk response—Identify ways to manage or prevent the risk.
• Develop a contingency plan or preventative measures—Convert risk response into tasks.

With Adobe Sign, we can see where our contracts are at all times. The added visibility strengthens client relationships and frees up time for us to focus on other critical activities.

JOOST VAN DE BUNT
Business development manager
KLM
5 Implement your project

Hold regular status meetings
During your implementation, hold regular status meetings to track detailed plan execution, measure progress and execute course corrections, if needed.

Measure and report success
Regular measurement and reporting on your success metrics will help ensure you can readily identify successes, as well as any areas that need improvement.

Review project risks and mitigation plans
Regularly review risks and mitigation plans, and track your results and metrics. Should any risks increase in likelihood, discuss them at your regular status meeting to develop a risk response.

Quarterly business reviews
Your Adobe CSM will schedule joint quarterly business reviews (QBRs). These reviews are a significant opportunity to get visibility into any project in progress, as well as expand the focus to other areas where e-signatures can be utilized in your organization. QBRs are most effective when your executives are involved.

Best Practice
Use this best practice agenda for your QBR. Make sure your full account team attends the meeting:
- Utilization statistics
- Support tickets
- Current and future implementation review
- Recommendations
- Adobe roadmap
- Important dates and next steps

Adobe Sign makes the contract process seamless. We can update templates centrally and maintain control over our client and sales communications, confident that all contracts adhere to legal requirements.

JAY KLAUMINZER
Head of North American local business
Groupon
Measure progress and share success

1. Regularly measure and record progress
Use the success metrics defined at the beginning of the project to ensure you have solid data detailing the benefits of the transformation. Regularly measure and record progress against these metrics.

2. Determine lessons learned
Gather input from users and stakeholders on the lessons learned from the project.
• What went well and contributed to the success of the program?
• What unanticipated benefits were derived?
• What risks occurred that were’t anticipated?
• Are there any additional areas that could have been improved during the project?

3. Celebrate success
Share your success with e-signatures with other groups and departments using the Adobe Sign Share Your Success kit. Gather feedback to identify other areas that could benefit from e-signatures.

4. Identify the next phase of your implementation project
Review your prioritization list and the business processes on page 5 to decide the next phase of your implementation project. Remember that any process that requires a physical or wet signature is an opportunity for e-signing.

Best Practice
• Use the Adobe Sign Share Your Success kit to celebrate your success and demonstrate the benefits of e-signatures to key stakeholders in your organization.

Resources
• Use the Adobe Sign Share Your Success kit to share the benefits of e-signatures with key stakeholders in your organization.
Looking forward

Build on your momentum
Continue to build your rollout plan to help ensure continued adoption and success of e-signatures at your organization.

As you roll out e-signatures throughout your company, build on your success by creating an e-signature infrastructure:

• Create an e-signature system architecture—Create a system architecture that consolidates all lines of business, business processes and geographies, and critical systems your organization integrates with.
• Create an Adobe Sign center of excellence—Track the success and use of e-signatures in your organization. When new lines of business are considering e-signatures, provide advice and assistance to help them make the move.
• Create an effective e-signature policy—Your legal department can create a master signature policy to help guide your organization’s efforts.
• Define a data retention policy—Your legal department can examine and define your organization’s data retention policy. Adobe Sign supports a customizable data retention policy that can be configured to delete documents and collected data from Adobe Sign. It complies with several industry standards for data security and availability such as PCI DSS 3.0, HIPAA, SOC 2 Type II and ISO 27001.

Resources
- Developing an effective electronic signature policy
- Adobe Sign Document Retention

Best Practice
Use this guide as a reference for your next project.
1. Define your objectives and business goals
   - How leading companies are using Adobe Sign
     - Adobe Sign customer showcase
   - How Adobe uses Adobe Sign
     - HR
     - Legal
     - Procurement

2. Build your implementation team
   - Customer success services will help you get started
     - Adobe Document Cloud Customer Success datasheet

3. Select, prioritize and transform business processes
   - Best practice: Workflows
     - Migrating workflows from paper to digital
   - Best practice: Templates
     - How to create forms with text tags
   - Best practice: Integration
     - Adobe partner integration reference guides
   - Success metrics tool
     - Resource Saver Calculator

4. Develop your implementation plan
   - Learning about e-signatures
     - Adobe Sign website
     - Adobe Sign FAQ
   - Adobe Sign API
     - Adobe Sign API Guide
   - Best practice: Implementation strategies
     - Creating an Effective Deployment Strategy for Adobe Sign
   - Implementation strategies of leading companies
     - Customer success stories
     - Adobe success stories: HR, Legal and Procurement
   - System integrations with Adobe Sign
     - List of the business system integrations
     - Adobe partner integration reference guides
   - Best practice: Developing a communication plan
     - Creating an effective deployment communication plan
   - Developing a training plan
     - On-demand training videos
     - Adobe Sign online help
     - Adobe Sign reference guides
     - Best practice articles
     - 5 steps to developing an effective training plan
     - Adobe Sign: Ask Me Anything Webinars
     - Adobe Sign Share Your Success kit
     - Quarterly best practice-focused webinars via email invitation

Expand on your success
   - Best practice: Sharing the benefits of e-signatures throughout your organization
     - Adobe Sign Share Your Success kit

Looking forward
   - Best practice: Creating an e-signature policy
     - Developing an effective electronic signature policy
   - Best practice: Defining a data retention policy
     - Adobe Sign Document Retention