How IT can enable the business to close deals faster

Paper and manual processes grind the sales cycle to a halt. But IT has the power to solve the problem by leveraging Adobe Document Cloud solutions.

Manual processes impact revenue and productivity

With all the technology at their disposal today, companies still employ sales processes that involve too much waiting. Sales reps may wait for emails, returned phone calls and various parties to appear in the office. Customers may wait for information, documents to arrive or executive approval. A deal that is all but official can be in limbo for days or weeks while all parties review and revise agreements, collect signatures and courier signed documents back and forth.

Usually, there isn't an easy way to know the current status of the contract or find the most recent copy, and time spent finding this information is time the rep isn't selling. Any errors in agreements caused by manual processes can set the deal back even further. And sales reps know the danger in delay: If it takes too long, they may lose the deal. Delays also wreak havoc with sales forecasting, impacting the entire business and a company's ability to compete.

But as enormous as the problems may be, there is a simple solution that is easy for IT to implement and easy for sales departments to adopt. It involves minimal investment, software that IT and customers have already installed and virtually no learning curve.

Adobe Document Cloud is a digital document communications solution that can accelerate the sales process and automate tasks for busy sales reps, while providing greater visibility into the status of contracts sent out for review. Speed up the sales cycle by eliminating ad hoc documents, printing, faxing and overnighting.

Adobe Document Cloud simplifies document creation, collaboration, distribution and approvals by combining the complete power of *Adobe Sign* for automating signing and approvals, plus *Adobe Acrobat* for organizing, protecting, and collaborating on high value business documents. And because Adobe Document Cloud works seamlessly with organizational processes and infrastructure, it offers IT departments the opportunity to act as a strategic business partner and bring a real competitive advantage to the entire organization. This white paper describes how IT departments can lead the business toward making the sales process faster and more agile—all within in a trusted environment.

Remove sales roadblocks

IT departments are all too accustomed to hearing about game-changing innovations. But many times, the hoped-for productivity gains don't come to pass. Integrations turn out to be complicated, deployments take too long and learning curves are too high.

Adobe Document Cloud takes little time to deploy, uses a familiar tool and works with existing sales and productivity tools. Sales can spend less time on paperwork and on tracking where contracts are in the process. With a click of the mouse, sales reps and customers can view, approve and sign documents, whether they are in the office or on the go.

Make it convenient for reps

The most valuable use of sales reps' time is courting new customers. But today, they spend far too much time on administrative tasks like sending and pursuing emails. Adobe Document Cloud can give reps the freedom to do their jobs more effectively.

- **Get to the customer while interest is high.** No more time wasted copying, faxing and scanning. Sales reps can leverage document templates to quickly send relevant marketing materials and personalized quotes, and close a deal before customer interest wanes.

- **Help the sales team work productively.** Because documents live in the cloud, sales reps can get the latest version of sales collateral or edit a contract while on the road or at home.

- **Integrate with other sales apps.** Adobe Document Cloud integrates with the same customer relationship management (CRM) or sales force automation (SFA) systems that reps already use every day. Also, Adobe Document Cloud integrates with leading productivity tools including Microsoft Office, SharePoint, Dropbox and more. These integrations can minimize rework and data entry, freeing up reps to focus on selling.

Close deals faster

The faster deals close, the faster prospects become paying customers. Adobe Document Cloud helps keep the sales cycle moving.

- **Impress prospects.** Reps can quickly access and forward the latest version of documents, such as marketing materials, no matter where they are—and prospects can reliably view them on any device, whether they are at home, in the office or on the go.

- **Deliver accurate contracts quickly.** By leveraging document templates and automated data collection from other forms and contracts, reps can quickly deliver professional quotes and contracts without the potential errors associated with manual documents and data rekeying.

- **Make review processes transparent.** A lot can happen to a contract before it's signed. Terms may be debated and modified, and multiple parties often must weigh in. Tools in Acrobat DC let all parties redline or comment on documents, and a streamlined process helps document owners incorporate those edits easily. Companies can manage version control, maintain an audit trail of contract changes and simplify a complex review, helping to ensure that the process remains transparent for all parties.

- **Track the approval process.** Real-time insight into the status of approvals helps ensure that deals don't fall through the cracks. And if the process stalls, reps can pinpoint the roadblock. They can access real-time reports on who has received, viewed and signed and when and whose signatures are still needed. Greater visibility into the status of contracts also improves the accuracy of forecasting.

- **Improve renewal and upsell rates.** As contract renewal time nears, reps can collaborate with team members to produce compelling and professional documents that help persuade customers to renew and expand their purchase.

Make it easy for customers

These days, customers expect the tools they use to be simple and intuitive. So if they perceive the sales process to be a hassle, they'll quickly disengage and turn to a company that makes it easier.

- **View, fill in and sign from anywhere.** Customers are just as pressed for time as sales reps. They want your processes to match the way they already work, whether on a mobile device, tablet or desktop—without printing documents, installing software, creating new logins or ever touching a pen. Adobe Document Cloud lets customers reliably view, fill in if necessary and sign forms and documents from anywhere—with no new software required.

- **Make it local.** Adobe Document Cloud supports multiple languages, making viewing and signing easier for customers in locations around the globe.

Make the organization more nimble

The ability to quickly respond to change is what makes or breaks an organization. And because Adobe Document Cloud requires few IT resources to deploy or maintain, it can create that kind of agility in both the sales and IT departments.

Deploy quickly

Adobe Document Cloud can be deployed in almost no time to a small group or the whole enterprise.

- **Get value faster.** Organizations experience very few barriers to deployment or adoption. With most people familiar with Acrobat Reader and many organizations already using Acrobat, there is virtually no learning curve.

- **Scale on demand.** Test the process with a single client or group of clients. Then roll it out to all of sales. From a single dashboard, you can manage your Acrobat DC and Adobe Creative Cloud entitlements by user or group, making it easy to increase seats as necessary.

Integrate with existing systems

The sales contract process can't be integrated with existing systems when it is manual and offline. Adobe Document Cloud unlocks the value hidden in other systems by pulling contracts and documents into the systems that sales reps already use every day.

- **Enhance previous sales application investments.** Adobe Document Cloud includes turnkey integrations with several SFA and Quote to Cash (QTC) systems, including Salesforce, Microsoft Dynamics CRM, NetSuite, SugarCRM, Apttus, Oracle CPQ and IBM Emptoris. Reps can send completed contracts for signature and approval directly from existing systems and track their status continuously as they are viewed and signed by customers.

- **Integrate with other business applications.** Adobe Document Cloud works seamlessly with other common document applications, including Microsoft Word and Excel. Turn Microsoft Word documents into fillable PDFs; export PDF content into Word, Excel, PowerPoint and more; and protect Office documents from within their applications. Adobe Document Cloud APIs allow customization according to established workflows. Adobe Document Cloud can also be integrated with popular business applications such as SharePoint, Google Docs, Box and more.

- **Extract greater value from proven business processes.** Adobe Document Cloud requires few changes to existing processes, so it's easy and cost-effective to roll out to other parts of the business, such as procurement and HR.

- **Build on current business process improvement investments.** Implementing Adobe Document Cloud is an easy way to build on your current BPI investments in areas such as contract lifecycle management and document storage.

Meet security objectives

Adobe Document Cloud streamlines and speeds up sales processes. But most IT decision makers want to know about the security of the solution. Adobe Document Cloud offers exactly the security and tracking you need—without requiring a large IT investment or complicated integrations with existing systems.

Protect sensitive information

Documents containing sensitive information are often distributed to customers and prospects. Protect the privacy and security of information as it travels inside and outside the firewall.

- **Password-protect PDFs.** Easily convert Microsoft Office documents into PDF files from within Office applications, and apply a password to restrict access. Only users who know the password can view the file.

- **Restrict editing, printing and/or copying.** Apply document permissions to PDF files, such as quotes or contracts, to maintain document integrity and control distribution. Integration with Microsoft Office means reps can secure a document and turn it into PDF in a single step from within an Office application.

- **Validate the authenticity of documents.** Allow authors to digitally sign documents with a certificate-based digital ID, helping to ensure that documents are not tampered with during their entire lifecycle.

Store contracts securely in the cloud

Because sales contracts may contain confidential or sensitive information, protecting electronic contracts is paramount. And while IT departments may feel most comfortable storing documents securely on in-house servers, the reality is that it involves some risks. Today, sales reps are most likely to work with contracts in one of two ways. First, they may work with contracts in paper form, leaving them vulnerable to loss or theft without leaving an audit trail. Second, they may dump contracts into a personal cloud storage folder that lets them access documents from anywhere but leaves contracts vulnerable to a breach or stolen or lost device.

Adobe Document Cloud stores signed contracts in a secure online repository that is accessible from anywhere and simple to search. Passwords and permissions control document access, and every document sent for signature maintains an audit trail that shows who has accessed it, when and how.

Enable sales to work faster—with a solution IT can trust

Sales organizations are rapidly replacing manual document processes because they're out of sync with the way customers and employees want to work. IT departments are removing a major source of pain for sales with Adobe Document Cloud. It combines the power of Acrobat DC, Adobe Sign PDF software, workflow tools, cloud services and turnkey integrations with sales applications to satisfy everyone who needs to create, edit, route, sign, track and store sales documents—while providing the security and agility that satisfy IT.

Thousands of organizations around the world have turned to Adobe to speed up sales cycles and close deals faster. From document creation and review to collaboration, Adobe Document Cloud streamlines the entire process. *Adobe Sign* and PDF services in Adobe Document Cloud move contracts securely through the signature process, including sending, signing, tracking and archiving. Adobe Document Cloud has low overhead, is simple to implement and easy to use—and its tools are familiar to enterprises around the world.

Adobe Document Cloud is backed by rigorous enterprise security standards that millions of customers have come to trust over the company's 30-year history. Adobe invented the PDF standard and is widely recognized as the leader in secure, reliable digital document workflows.

- The Adobe Document Cloud services hosted in Rackspace and Amazon Web Services (AWS) meet the following security certifications:
  - Payment Card Industry Data Security Standard (PCI DSS) level 1 (merchant and service provider)
  - Health Insurance Portability and Accountability Act (HIPAA)
  - U.S.-EU Safe Harbor Framework
  - ISO 27001
  - SOC 1
  - SOC 2 Type 2

- Adobe Sign has a high uptime and availability record. Current service status and past service availability records are available online at *www.adobe.com/go/trust-dc*.

- Adobe Sign uses AES 256-bit encryption for data at rest and support HTTPS TLS v1.0 or higher for protecting data in transit.

Checklist: How to evaluate a digital document communications solution for sales

A secure, cloud-based digital document communications solution can be game changing for sales departments—if it offers the right capabilities. Look for software that offers these features.

Authoring, editing and collaboration

☐ Sales reps can convert paper documents to searchable and editable documents.

☐ Reusable document templates help sales create personalized documents quickly.

☐ Sales can collaborate with other groups on documents, using familiar software, whether they're in the office or on the road.

☐ Sales can easily brand documents with the company's logo, colors and messaging.

Sending, tracking and managing

☐ Reps can upload, customize and send contracts in a few quick clicks—as easy as email.

☐ Real-time tracking of contracts indicates exactly when they're opened, viewed, signed.

☐ Contract initiators can get alerts when things happen (and when they don't).

☐ Sales reps can present and gather contracts, even when offline.

Integration with existing systems

☐ Solution integrates with the sales and CRM systems your reps use.

☐ Integrations are premade and require little or no manual work.

☐ *E-signature* process is automated within the CRM system.

☐ Customer records and signed contracts are accessible from within the CRM system.

Secure storage and access

☐ Documents are encrypted and stored in a secure cloud environment that you trust.

☐ Or documents can be easily stored in existing document repositories and sent for signature from existing applications.

☐ Secure passwords and permissions are used to control access to all documents.

☐ Documents stored in the cloud are easily searchable.

☐ Reps can retrieve executed contracts anytime, anywhere, on any device.

☐ Signed documents have an easily accessible audit trail and history.

☐ Signers' identities are verified through multiple mechanisms, including knowledge-based authentication that uses industry-standard questions extracted from public and commercial databases.

Customer experience

☐ Recipients can *e-sign* contracts anywhere, anytime, on any smartphone, tablet or desktop.

☐ Solution eliminates paper so customers don't have to print, fax or mail.

☐ Solution requires no software installations or new logins and lets people view, fill out and sign using software most already have, such as free Acrobat Reader.

☐ Parties automatically receive copies of a signed contract.

☐ Solution lets people view, fill out and sign from their desktop, tablet or smartphone.

For more information

www.adobe.com/go/dc-enterprise