Adobe Acrobat Sign

Adobe

How to close gaps in your digital-first sales strategy

(Hint, start with your documents)

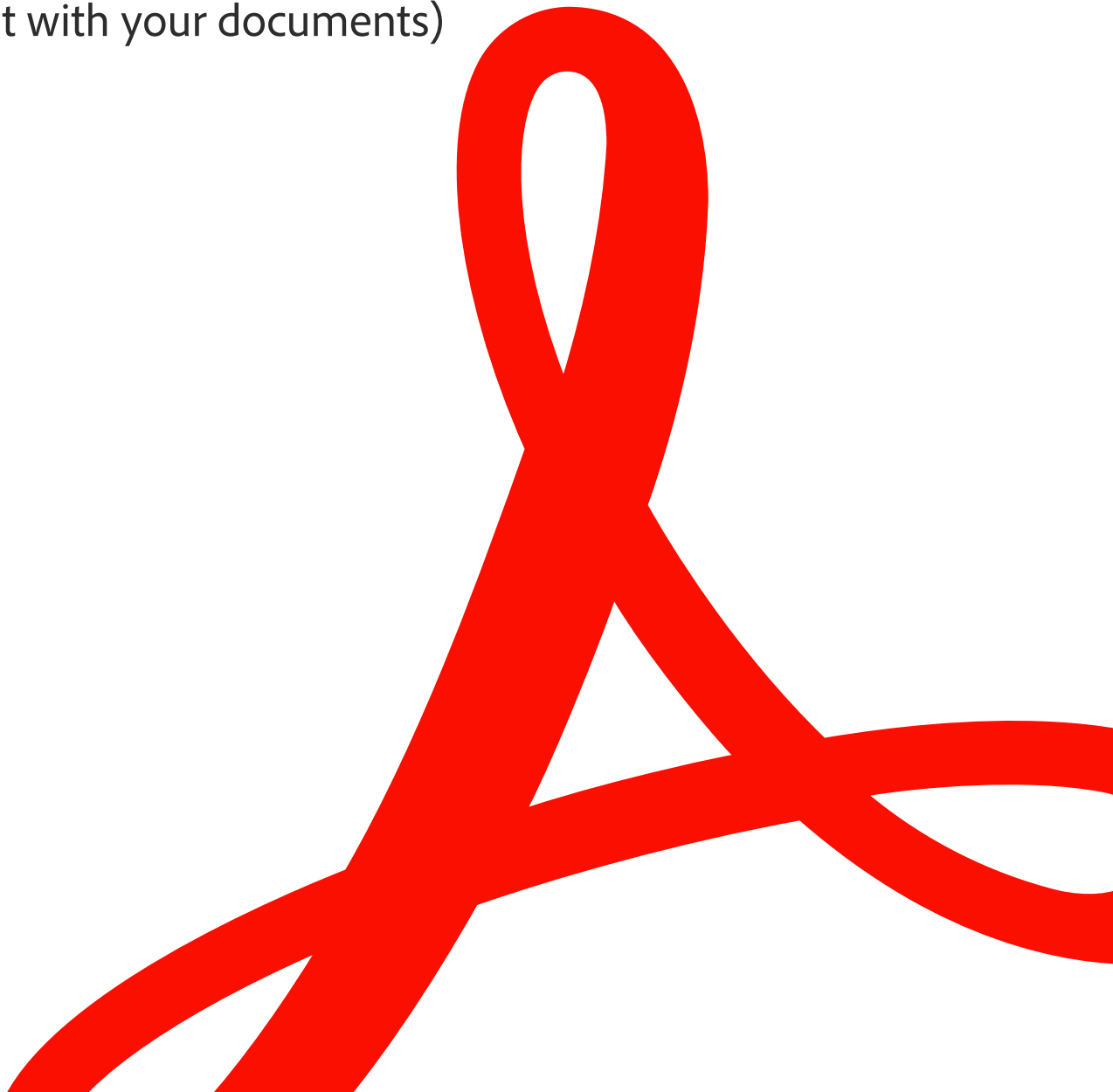# Table of contents

What you'll learn

Despite the advantages provided by CRM solutions, many sales processes remain stubbornly manual—slowing deal origination and progress, impeding sales productivity, and impacting revenue. This white paper is designed to help sales and IT leaders understand how data-driven documents can eliminate outdated processes, what benefits they can expect, and ways to optimize their approach to obtain more value from their CRM solution today and tomorrow.

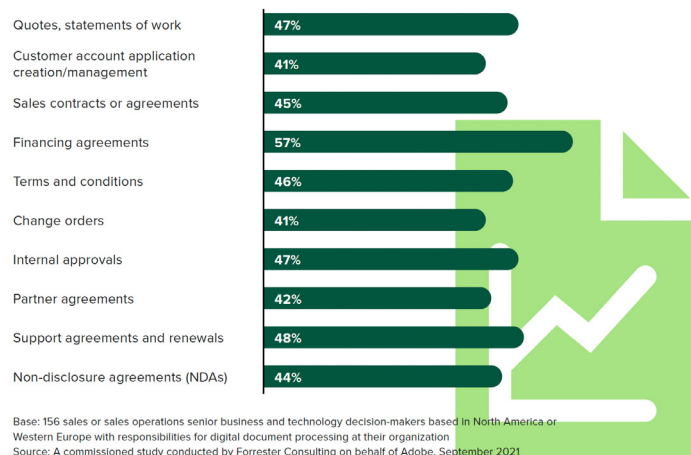# The missing link in your digital-first sales strategy: Documents

In 2020, businesses of all sizes were forced to embark on a crash-course in digitization. While many had launched digital transformation initiatives, all had to fast-track automating the day-to-day tasks that kept operations going.

Sales organizations, profoundly affected by the inability to do business in person, embraced technologies that allowed them to meet virtually and automate human-driven tasks to accelerate processes. But, when it came to transforming customer relationship management (CRM) processes, that approach proved insufficient. Document-driven processes remained stubbornly manual, creating a painful productivity obstacle—**because every relationship milestone culminates in a document**. (for example, from new account applications to sales orders to service requests to contract renewals).

Today, the pressure to automate sales processes is higher than ever. Your customers have implemented their own digital-first processes, so they expect to do business with vendors who have done the same. Recent Forrester research,[*] however, reveals that the most commonly used sales and departmental documents still remain either fully paper based or a mix of paper and digital.

"To the best of your knowledge, how paper-based or digital are each of the following sales processes at your organization today?"

(Showing "Fully paper-based or manual" and "Mix of paper and digital" responses) [1]

Process	%
Quotes, statements of work	47%
Customer account application creation/management	41%
Sales contracts or agreements	45%
Financing agreements	57%
Terms and conditions	46%
Change orders	41%
Internal approvals	47%
Partner agreements	42%
Support agreements and renewals	48%
Non-disclosure agreements (NDAs)	44%

Base: 156 sales or sales operations senior business and technology decision-makers based in North America or Western Europe with responsibilities for digital document processing at their organization
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, September 2021

Why the delay?

Documents represent commitments. They need to be packed with the right data, approved by the right people, and adhere to a process that complies with industry, country, and company regulations. Consequently, automating document workflows isn't a simple task—digitization needs to be intelligent, proven, secure, and compliant.

Today, the integration of Adobe Acrobat Sign and Salesforce is providing a digital-first solution to the document automation challenge. Organizations that have integrated the two platforms can now implement a comprehensive, digital approach to CRM—automating both human and document-driven tasks in a seamless workflow.

A recent innovation to this best-of-breed integration, *the Document Builder feature*, now automates the document generation phase of a workflow, creating *data-driven documents*. The integration's ability to automate end-to-end document workflows not only speeds cycle time, fuels cost and productivity savings, and reduces business risk—it delivers better business outcomes and greater competitive advantage. Not surprisingly, data-driven documents are poised to become the norm in CRM processes wherever documents drive business-critical transactions.

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[*] "[Why Sales Teams Need Advanced Digital Document Capabilities To Meet Modern Buyer Needs](#)," a commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2021.

What are data-driven documents and why are they important?

In "tech-speak," the digital document we are accustomed to using is really a "presentation layer"—the end product of a powerful series of underlying layers of automation services. A data-driven document template is programmed to automatically populate with data, content, images, calculation formulas, and intelligent fields that gather content like dates and e-signatures, and more. Its accuracy, appearance, and delivery are driven by automation capabilities like:

- Business rules that ensure the content is appropriately customized

- Programming that automatically formats the document so it is ready to send

- And a set of integrated workflows that ensure it follows a defined, secure, and compliant process

Anatomy of a data-driven document

Data-driven documents include a range of data and content types and are programmed to complete a defined process.

- **Customer data** from basics like name and address to business logos and personalized content

- **Product and services information** like product names, SKUs, descriptions, pricing, and so on

- **Calculations** driven by customizable formulas

- **Terms and conditions** about how, when, and where products and services will be delivered and the consequences if they are not

- **Conditional content**, including rules-driven logic that ensures all terms, data, calculations and so on are accurate for a *specific customer*

- **Data that confirms the agreement** such as e-signature, signer titles, dates, and so on

- **Programming** that defines the precise process each document must follow (for example, routing order, identity validation, compliant e-signature requirements, where the signed document will be securely stored, and so on)

Where do data-driven documents "live"?

Data-driven documents are produced by a wide range of departmental workflows, but they are very common in CRM applications. Every data-driven document needs at least one data source, and CRM solutions like Salesforce are designed to capture and optimize customer intelligence. That intelligence is relevant to every phase of the customer lifecycle—from the moment a prospect converts to a lead, to the initial proposal, to the first contract, to onboarding, to the first service request—and must appear in the documents that conclude each milestone. Not surprisingly, contracts, onboarding documents, and service requests are the top three most common documents in Salesforce that require e-signatures.

Why should you care about data-driven documents?

While the backend processes of getting sales, onboarding, and service documents signed has been automated, the traditional method used to create those documents has all the earmarks of a process begging to be digitized:

- **It's manual.** Sales contracts often take weeks to research and create before they are sent to a recipient.

- **It's error-prone.** The data that flows into contracts, onboarding documents, and service requests change all the time. Data entry errors or use of old data can—at best—delay business, and—at worst—commit you to delivering a product or a price that is no longer feasible.

- **It requires an army of people to review and approve.** Inaccurate terms and conditions increase business risk. It's common for legal and deal desk staff to spend hours checking all the terms and conditions in a contract and ensuring the most up-to-date data and document templates are being used.

- **It's painfully slow, resulting in missed opportunities.** In the digital age, the early contract often wins the deal.

The power of "if…then"

Exceptions are a reality, but they create complexity and delays in contract development and reviews. For instance:

- Products don't get delivered on weekends.

- VIP customers get discounts that others don't get.

- Certain countries adhere to data privacy and sovereignty requirements.

- Some services require special terms and conditions.

The conditional logic incorporated into Acrobat Sign for Salesforce using the Document Builder feature creates smarter documents that detect if certain conditions exist, then trigger custom content.

With conditional logic, you help ensure the right content is in the data-driven document, without delays.

Data-driven documents solve all of those problems. And when combined with automated e-signature workflows, sales departments can expect the following benefits.

Redefining cycle time

Faster cycle time increases sales velocity and delivers a better customer experience. By automating data-driven document generation and embedding it in an end-to-end e-signature workflow, organizations can consolidate multiple steps (for example, research, data entry, accuracy review, sending, signing, tracking, and storage) into a single, secure, automated process that both opens and closes a business transaction—sometimes within a few minutes.

Ensuring always accurate documents

No more managing multiple template versions for the same document. Document accuracy is ensured through a one-time process of document tagging to pull in up-to-date data from Salesforce. Setting business rules allows conditional logic to include the right content for each customer.

Enhancing security and compliance at the earliest stage of a transaction

Contracts, onboarding documents, and service requests often include sensitive information. Protracted document generation and review processes via emails and printed documents create a security gap in which sensitive content can get into the wrong hands. Combining data-driven document generation with a proven secure and compliant e-signature workflow closes that gap—securing the end-to-end workflow.

More than process acceleration, process **transformation**

When data-driven documents become a core competency, organizations can do more than speed up existing sales processes, they can transform them. If sales reps can instantly create a contract during a customer meeting, they can close the deal in that meeting—capturing the e-signature in the moment that the customer is most likely to sign and before a competitor can disrupt a deal. And when a rep closes a deal with a new customer—Acrobat Sign with Document Builder can instantly trigger generation of a data-driven onboarding document. By converging deal signing and onboarding steps into one process, organizations can deliver value to the customer sooner and recognize revenue faster. Everyone wins.

Better outcomes

The initial benefits you'll see from data-driven document processes will be obvious: faster cycle times and employees having more time to focus on value-added work. What will be less obvious, however, are the "ripple effects" of those benefits.

- **When sales reps have more time to sell, deal volumes are likely to increase.** When your contract consistently arrives in a customer's hands before your ccompetitors, that theoretically should increase win rates. The combination of both factors should have a positive impact on revenue.

- **Manual tasks replaced with high-value work.** When legal and deal desk teams are freed from low-value work like reviewing contracts and chasing down deal status, they can devote more time to higher value work.

As your organization implements data-driven documents, be sure to track the ripple-effect impact of both these changes.

What's the future of data-driven documents?

Digital documents have been evolving since Adobe launched the PDF format more than 30 years ago—and will continue to evolve. As organizations scale implementations of data-driven document processes, they will innovate in two key ways:

1. Adding more sources of data and content to the document itself

2. Adding custom processes to the automated workflow. Both these innovations can be enabled through Acrobat Sign APIs and Document Services APIs.

Adding more sources of data and content

The more personalized and comprehensive a data-driven document is, the more effective it will be. While organizations keep a lot of data in Salesforce clouds, adding content from other sources can add significant value. For instance, a contract could incorporate financial data from an ERP system, a custom drawing from a CAD program, or an image from Adobe Creative Cloud, or insert marketing content from Adobe Experience Cloud. These examples are just the tip of the iceberg.

The easier it is to add these sources, the faster an organization can reap the value. Acrobat Sign offers out-of-the box integrations with more than 80 applications, included in the base license fee. If an organization wants to automatically pull in data, content, or images from applications for which there is no prebuilt integration, Acrobat Sign APIs (and Adobe Creative Cloud and Experience Cloud APIs) provide an efficient path. And low-code/no-code solutions like Power Automate can make leveraging the Adobe APIs accessible to the non-developer.

Customizing the automated workflow

The Acrobat Sign and Document Builder for Salesforce integration automates a common workflow used by many departments: generating a data-driven document (via Document Builder); obtaining document approval and e-signature; tracking status in real time; and securely storing the document with a complete audit trail—all in Salesforce.

Organizations can add or customize steps in that workflow using Acrobat Sign APIs and prebuilt integrations. Adobe is also building Microsoft's Power Automate directly into Acrobat Sign. Productivity gets a boost with these new automated capabilities. Users can access a growing list of prebuilt templates and the entire array of standard and premium connectors. Examples include saving all signed PDFs into a folder such as OneDrive, SharePoint, Google Drive, or Box, or dynamically creating a contract for signing based on predefined conditions (such as SKUs).

In the past, digitizing workflows has been the business of IT. Typically, IT prioritized initiatives based on the potential impact to the business, which meant processes deemed business critical and which affected the largest number of employees went to the top of the list.

The ability to simply "snap" new processes into a digital workflow will significantly enhance that prioritization process. Knowledge workers will have the power to leverage Adobe's low-code/no-code tools to build their own automated workflows, improving their productivity and allowing employee-driven digital transformation on a broad scale.

How to optimize deployment of data-driven documents

As you plan your organization's data-driven document deployment journey, consider what capabilities will be the highest priority as you scale use cases, incorporate more data sources, and customize workflows.

1. **Look for solutions that provide free access to native integrations and APIs.** The number and quality of prebuilt enterprise integrations and the availability of APIs will impact your ability to innovate. Avoid solutions that put restrictions on access or provide integrations that are cumbersome to use or deploy.

2. **Find solutions that reduce TCO and optimize ROI.** As you select the right document generation and e-signature platforms, consider:

   - How much will it cost to own and manage the end-to-end solution or the licensing of that solution?

   - How will the technology you choose impact your ROI on your existing investment in applications like Salesforce—especially if you use multiple Salesforce clouds?

3. **Time-to-value is an essential ingredient.** The easier it is to automate more workflows more completely, the better your organization can perform. Look for solutions that are designed for ease of automation and rapid adoption.

> " When you have it all (document generation and e-signature automation) in a nice, single package like Acrobat Sign, people aren't wondering about if they have the right number of licenses. They know they're able to do something and it allows them to just go do it."
>
> **CIO of State Agency**

The unfortunate reality: Multiple solutions, complex management, and extra fees are common

Despite the fact that data-driven documents often integrate with e-signature workflows, many e-signature providers and document generation vendors sell their solutions as separate products. Organizations that implement two separate solutions incur the following consequences:

- To provide users with the ability to generate documents and send them for e-signature, they will need to *pay two license fees per user per month*.

- Their IT department must absorb the resource costs required to integrate and maintain *two different* applications. They also must worry about license tracking. They will need to carefully monitor whether employees who need to generate data-driven documents and send them for e-signature each have two software licenses.

- And the typical pricing strategy used by these vendors is to charge additional fees for *every integration and every use of APIs.*

Each of these impacts adds up, raising the total cost of ownership (TCO) which, in turn, discourages empowering users with this functionality.

5 reasons why Adobe is different

Adobe, however, pursues a fundamentally different strategy. Here are 5 reasons why Adobe's value adds up:

1. **One cost-effective license for document generation and e-signature.** The Document Builder feature within the Acrobat Sign and Salesforce integration is included in the Acrobat Sign license. You pay one fee for both automated document generation and e-signature functionality.

2. **One application.** Document Builder is integrated within Acrobat Sign for Salesforce, so your IT team only needs to manage one integrated Adobe application for document generation and e-signature capabilities, including the licensing of that application.

3. **Free integrations and use of APIs.** Adobe does not charge for any prebuilt Acrobat Sign integrations or use of Acrobat Sign APIs. You get everything you need to automate and customize document-driven workflows in the Acrobat Sign license fee.

4. **Value can be applied across Salesforce clouds and apps.** The Acrobat Sign with Document Builder for Salesforce integration works across multiple Salesforce clouds and applications, including Sales Cloud, Financial Services Cloud, Health Cloud, Service Cloud and Salesforce CPQ. So you can add the power of data-driven documents and e-signature workflows to do more in the Salesforce clouds your employees use most.

5. **Exceptional time to value.** Prebuilt, native integrations like the Acrobat Sign for Salesforce solution include "drag-and-drop" and dropdown menu automation capabilities. Additional integrations such as Acrobat Sign integration with Power Automate further accelerate transformation initiatives and reduce the burden on your IT resources.

> " The main win for us was that Document Builder simplified our app portfolio in Salesforce. Instead of using two software tools, we can now converge into one (Acrobat Sign with Document Builder). We don't need to integrate the apps and it's easier for us to support."
>
> **Salesforce Administrator, Lighting and Energy Company**

Data-driven documents are essential to a digital-first sales strategy.

In the era of digital first, manual processes are not even in the running. Every time a digital process needs to pause for a manual step, it creates a backlog that undermines the benefits of the prior automated workflow. The goal must be to create a 100% automated workflow from start to finish.

The Acrobat Sign and Salesforce integration—enhanced by the free Document Builder feature—can address any digital gaps caused by manual document processes and empower your team to achieve more. But how do you get started?

- **Integrate.** First, if you have Acrobat Sign and Salesforce, but haven't integrated the two apps, ask your Salesforce administrator to install download the free Acrobat Sign and Document Builder apps and follow this straightforward process. (If you don't currently use Acrobat Sign, start a 30-day trial and follow the same instructions.) (Note: you can also install these apps in your Salesforce sandbox environment.)

- **Select documents to automate.** Look for documents that are used most frequently by your team for both external and internal use. (Yes, internally used forms and reports can drain productivity that can be restored by converting them to data-driven documents.) Proposals, contracts, finance agreements, statements of work, onboarding documents, and so on may all be low-hanging fruit opportunities for automation.

  - Identify those that heavily leverage Salesforce data.

  - Work with you Salesforce administrator or developer support staff to systematically enable those documents with Document Builder's automation capabilities.

  - Once a document is enabled, the document generation process is completely transparent to your sales team and can be completed in seconds.

- **Establish baseline measurements** by gathering data about the cycle time, costs, and productivity impacts of your current process. Ensure you look at all employee types who are impacted by the workflow. Record the data and estimate how many times that specific document workflow occurs.

- **Track quantifiable improvements.** Obtain measurements for your process before you automate. Then, post-automation, record cycle time, cost, and productivity improvements. When multiplied by the number of times that process occurs, total up your quantitative benefits.

- **Look for better outcomes.** Over time, measure the "ripple effect" outcomes that occur as a result of improvements in document automation. Has deal throughput increased? Have win rates improved? Have overall revenues increased? What has been the impact on customer and employee satisfaction?

- **Share your results** with IT and other department leads. They may have similar document workflows that could benefit from the Acrobat Sign and Salesforce integration—or from a wide range of other prebuilt Acrobat Sign integrations.

Learn more about Acrobat Sign with Document Builder for Salesforce or start a trial of Acrobat Sign for Salesforce today.