



**Top tips for shaping digital-first sales experiences.**

# Unlock the power of a **digital-first approach**.

Your organization has made an important investment in a CRM solution, such as Salesforce or Microsoft Dynamics 365. ✓

The next step in your digital transformation journey is making the most of that investment.

In this eBook, you'll learn what top sales leaders are doing to shape digital-first sales organizations that deliver frictionless, end-to-end buying experiences with e-signatures and automated document workflows seamlessly integrated with your CRM of choice.

We'll share proven and straightforward ways to empower sellers by unlocking technologies to accelerate sales cycles and elevate customer and employee experiences while maximizing ROI on your organization's CRM investments.



“With this kind of modernized sales, driven by integrated e-signatures, Aberdeen research found that businesses are:

**3x**

more likely to see faster and more efficient sales cycles.”\*

[Read the report](#)

# Elevate and automate your sales processes even more with e-signatures and automated workflows.

Implementing a CRM solution is just the beginning of the digital transformation journey.

Most modern sales organizations have implemented CRM technology, such as Salesforce or Microsoft Dynamics 365, to digitize the storage of their customer and sales data and convert it into actionable sales intelligence. But we find that only a fraction of these modern organizations have implemented technology to replace inefficient paper processes with end-to-end digital document workflows.

When sales contracts need to be printed and mailed or signatures need to be gathered manually or in person—that's a problem. A problem that slows down deals and delivers subpar buying experiences and frustrations all around. But it's one that's easily solved by implementing a globally compliant and secure e-signature solution that can be seamlessly and securely integrated with your CRM system.



# 64%

**“64%** Use electronic signatures within Microsoft Office or PDF documents to streamline sales process (NDAs, Contracts, Proposals, etc.).”<sup>†</sup>

[Read the report](#)

# Digitize documents across the customer lifecycle, from prospecting to renewal.

Sometimes it's hard to know where to start the process of digitizing documents.

We find that customers who identify the most-used paper documents see the quickest results. Think about all the documents used in your sales processes that require approvals, and see where you might make the most impact in your organization. Here are the most common sales-related documents that require signatures and are prime for digitization and e-signatures capabilities:

PROSPECTING AND QUALIFICATION	CLOSING	MAINTAINING	RENEWAL
<ul style="list-style-type: none"><li>▪ New account applications</li><li>▪ Nondisclosure agreements</li><li>▪ Terms and conditions</li><li>▪ Statements of work</li></ul>	<ul style="list-style-type: none"><li>▪ Sales contracts</li><li>▪ Quotes and proposals</li><li>▪ Financing applications</li><li>▪ Loan agreements</li><li>▪ Rental agreements</li><li>▪ Invoices</li></ul>	<ul style="list-style-type: none"><li>▪ Customer onboarding</li><li>▪ Change orders</li><li>▪ Project sign-offs</li><li>▪ Receipt of service</li><li>▪ Service agreements</li></ul>	<ul style="list-style-type: none"><li>▪ Renewal contracts</li><li>▪ Contract addendums</li><li>▪ Statements of work</li><li>▪ Insertion orders</li></ul>

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“Sales professionals estimated that their sales teams would be

**37%**

more efficient in closing deals using digital document processes as opposed to paper-based or manual processes.”<sup>†</sup>

[Read the report](#)

# Get every member of your sales organization on board.

E-signatures and automated workflows integrated with your CRM system can drastically improve how sales organizations function, but everyone needs to leverage the technology to become a truly digital-first organization. When we talk to salespeople on the front lines, here are the tangible features that they say make the most difference in their daily work and will help to get your team on board:

- **Generating custom sales documents**—automatically merging data from the CRM system to create custom, data-driven contracts, complete with conditional logic and automatic formatting of pricing tables
- **Automating workflows and routing order**—eliminating the need to send documents via email by automating the document workflow and signing order right from the start
- **Assigning roles to stakeholders**—this could include the signer, approver, acceptor, form filler, certified recipient, or delegator
- **Inviting multiple participants with a single request**—integrating with your CRM contact list to send a single contract to multiple signers, in any sequential order you choose
- **Setting up reminders, instant notifications, passwords, and expiration dates**—to keep documents moving securely and stay up-to-date on every contract's status
- **Creating reusable document templates**—eliminating common mistakes and ensuring consistent error-free results
- **Getting world-class security and compliance**—ensuring compliance with complex industry regulations and stringent security standards around the world



# Adobe is your **digital transformation** partner.

Adobe is committed to partnering with your team to achieve 100% digital sales document workflows. Together, we will empower your sales organization to hit their numbers, delight customers at every touchpoint, and make the most of your CRM investment.

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Contact us to learn more about taking the next step in your digital transformation journey by integrating Acrobat Sign into your sales processes.

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\* "E-Signatures Enable Anywhere and Anytime Efficiency and Performance for All Parts of a Business," Aberdeen, 2021.

† "Empower Sales with End-to-End Digital Workflows to Increase Win Rates and Retention," 451 Research, 2020.

‡ "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.