Adobe Sign Reseller Playbook

2021

This playbook is best suited for:

- Adobe Platinum, Gold, & Certified resellers

- Licensing Specialists

- Sales Representatives

- Marketers

Use this guide to direct & develop your Adobe Sign sales efforts.

Estimated reading time: 24 min.

Target Audience

Adobe Sign Targets

Identify the right buyer

Making sure the person you are meeting with has budget and authority begins by prioritizing roles likely to have responsibility for business outcomes that are impacted by document signing processes. Read on to learn how to better understand the outcomes that prioritized buyers are accountable to achieve, the challenges they face, and questions for engaging them.

Technology Leader

Department Leader
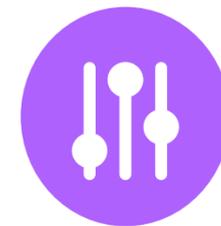
Influencers

Implementers

Technology Leaders

Common Titles

- CIO
- CTO

Objectives & Responsibilities

- Technology visions (digital transformation), decisions and budgets — focus on access and equity
- Alignment to overall strategic plan
- More efficient reliable and secure business processes
- Leading edge programs, relative to peers (Higher Education especially) — remote education in particular
- Sustainability (climate change impact, etc.)

Technology Leaders

How They Are Measured

- Business cases to justify budget or ROI

- Productivity and efficiency gains

- Implementation of technology within a set budget, operational efficiencies, and how the technology aligns to the overall strategic plan

- Improvements to the customer experience through the use of technology for both internal and external (students, staff, parents)

Document Process Challenges

- Implementation of digital transformation visions and modernizing infrastructure, storage, and security systems

- Change management, onboarding, and implementation

- Reliance and dependence on paper-based processes and resistance to digital shifts

- Complex, convoluted, bespoke and often dated IT systems that are complex to integrate with

- Accountability of workflow for compliance and audit
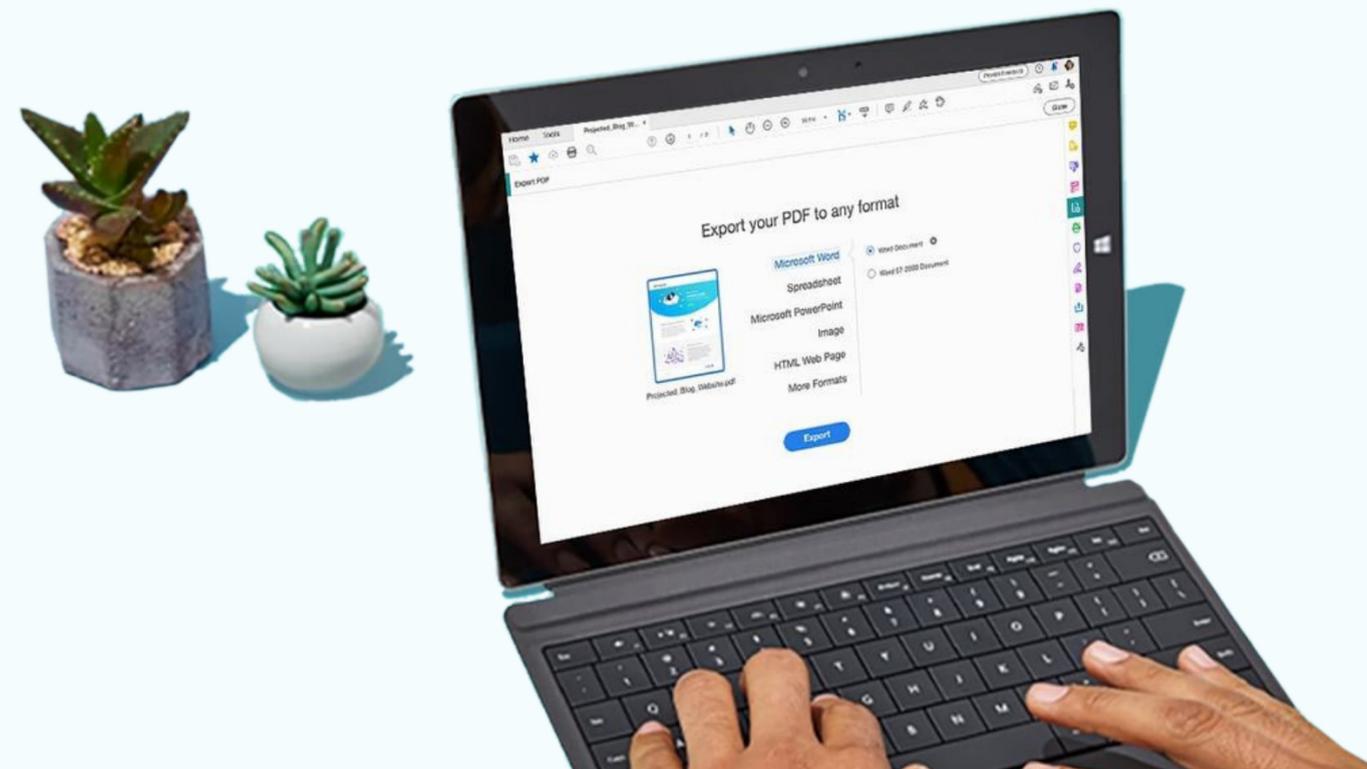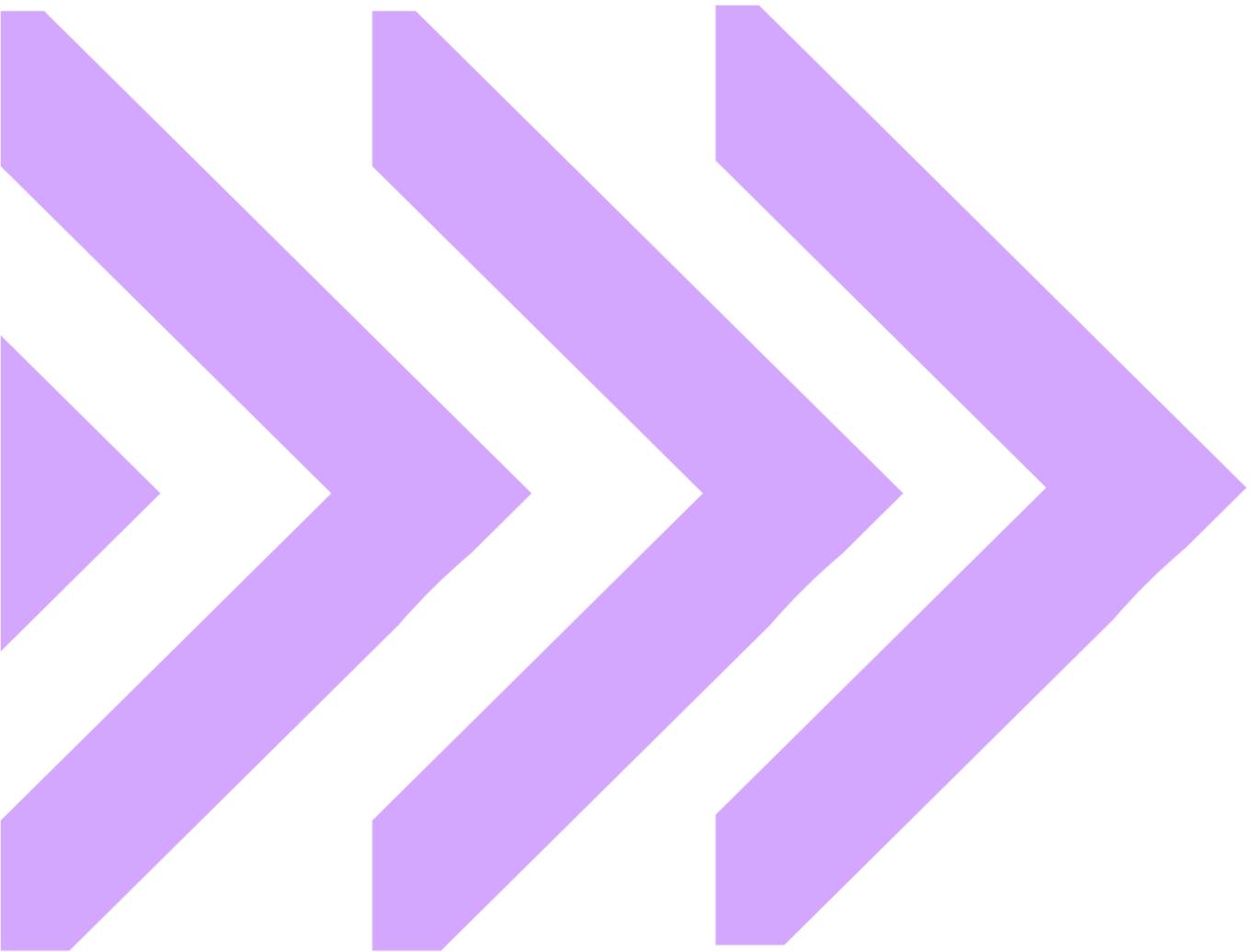
Technology Leaders

Questions to ask:

01 What is your view on digital transformation?

02 How are you keeping up with other institutions that are further ahead in digital transformation?

03 Where would one of your student's parents say there is room for improvement?

04 How do you protect information so that it cannot be viewed, altered, or used by others?

05 How does your institution protect sensitive information?

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Technology Leaders

Questions to ask:
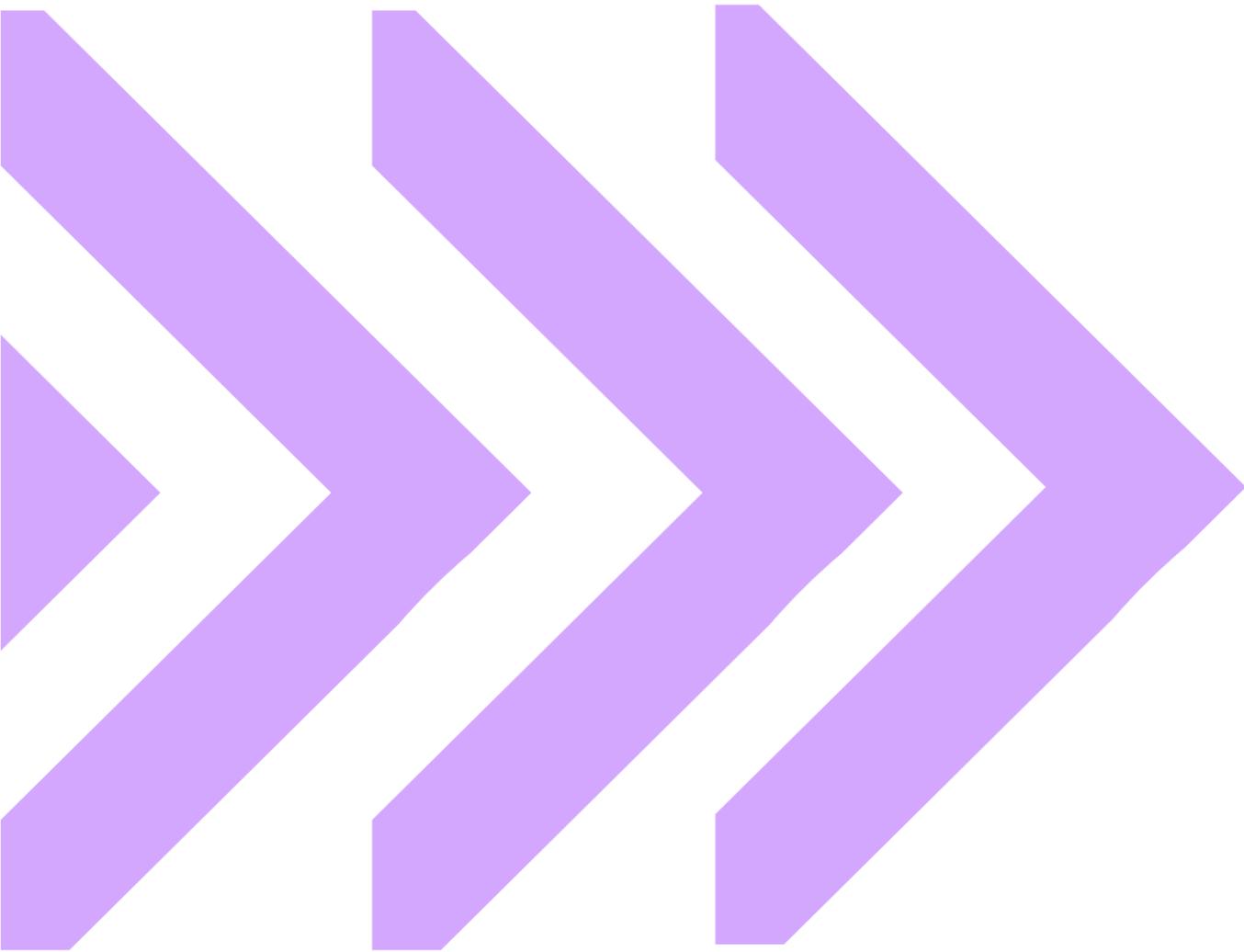
**06** Do you need to integrate with existing repositories? If so, which ones?

07 Do you need to integrate with existing backend systems? If so, which ones? SAP, LMS, LaserFiche?

08 Do you use Microsoft SharePoint, Dynamics, or Microsoft 365?

09 How does the district pay for document workflow today (ink, paper, stamps, and labor)?

Common Titles

Department leader—such as finance, procurement, HR, and Head of Admissions

How They Are Measured

- Meeting budget
- Student satisfaction
- Parent satisfaction
- Employee satisfaction
- Matriculation

Document Process Challenges

- Inability to track documents between departments and externally
- Inefficient operating environments to safeguard security and compliance, and to contain costs
- Deep differences in technology adoption between various constituent groups (faculty, staff, parents, and students)
- Reliance on paper-based processes and resistance to digital shifts
- Dependence on IT, CIO, or Tech experts for implementations

Department Leaders
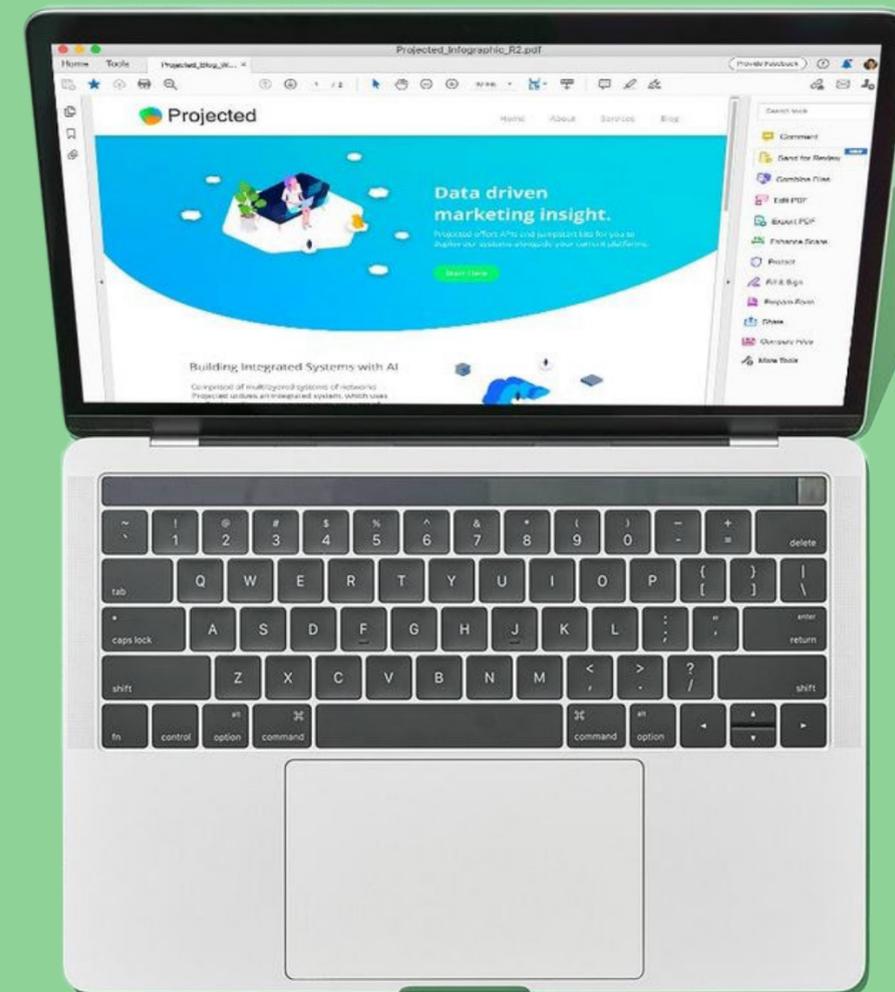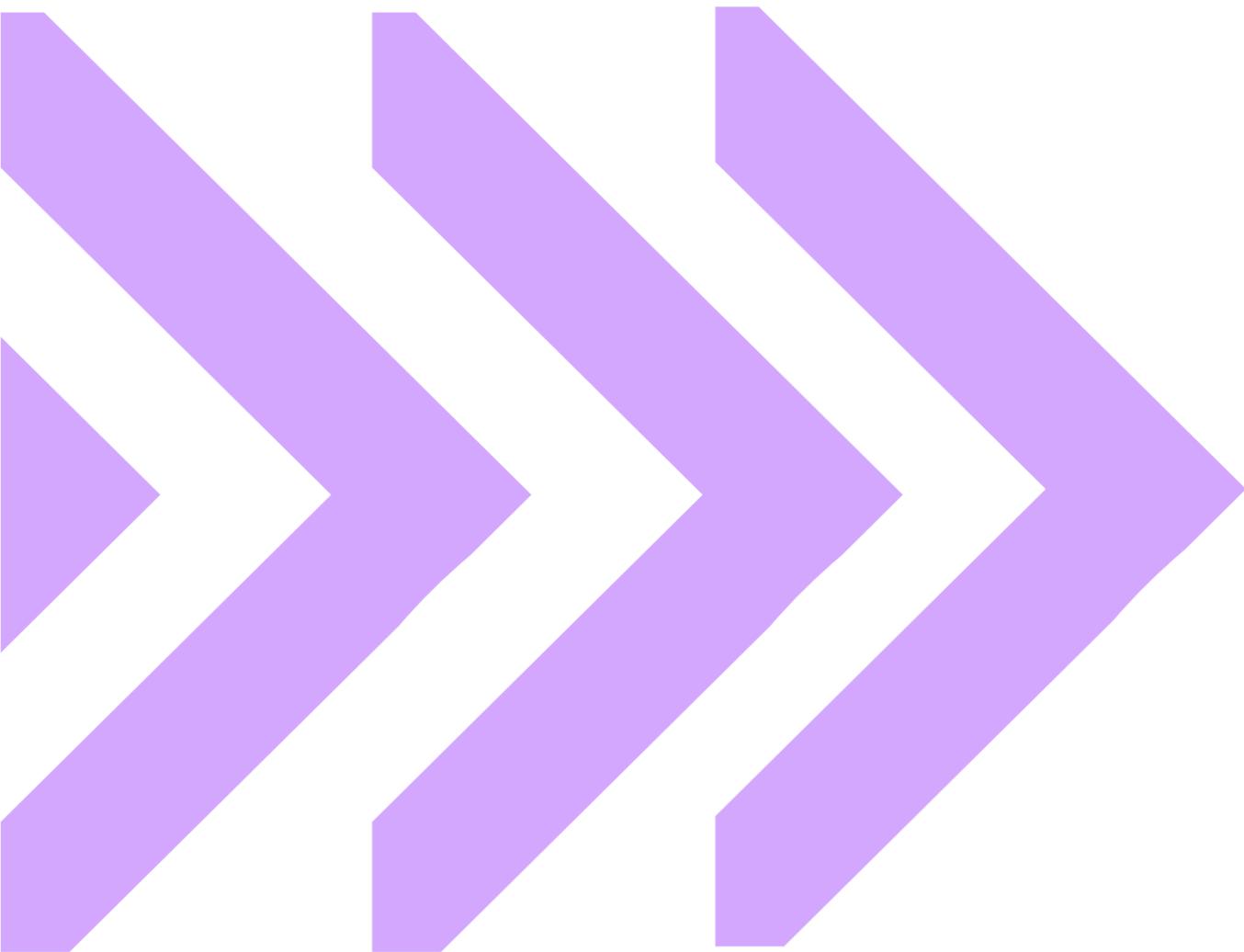
Department Leaders

Questions to ask:

01 How do you get forms signed by students, parents, staff, and vendors today? What inefficiencies do you see with your current approach?

02 Could you describe your ideal workflow management approach?

03 Approximately how many forms do you get signed by students or parents per year? Staff? Vendors or partners?

04 How do you protect information so that it cannot be viewed, altered, or used by others?

05 How much time and budget could your educational institution (or department) free up if copying and delivering of documents were eliminated on your campus?

Influencers

Common Titles

- K-12 Principal
- Higher Ed President
- Provost

Objectives & Responsibilities

- Strategy and decision making for all academic initiatives
- Teaching staff and curricula management
- Student success in testing (K12)
- Graduation and employment (Higher Ed)
- Consistent cross-departmental vision
- Provide the best staff and student experience
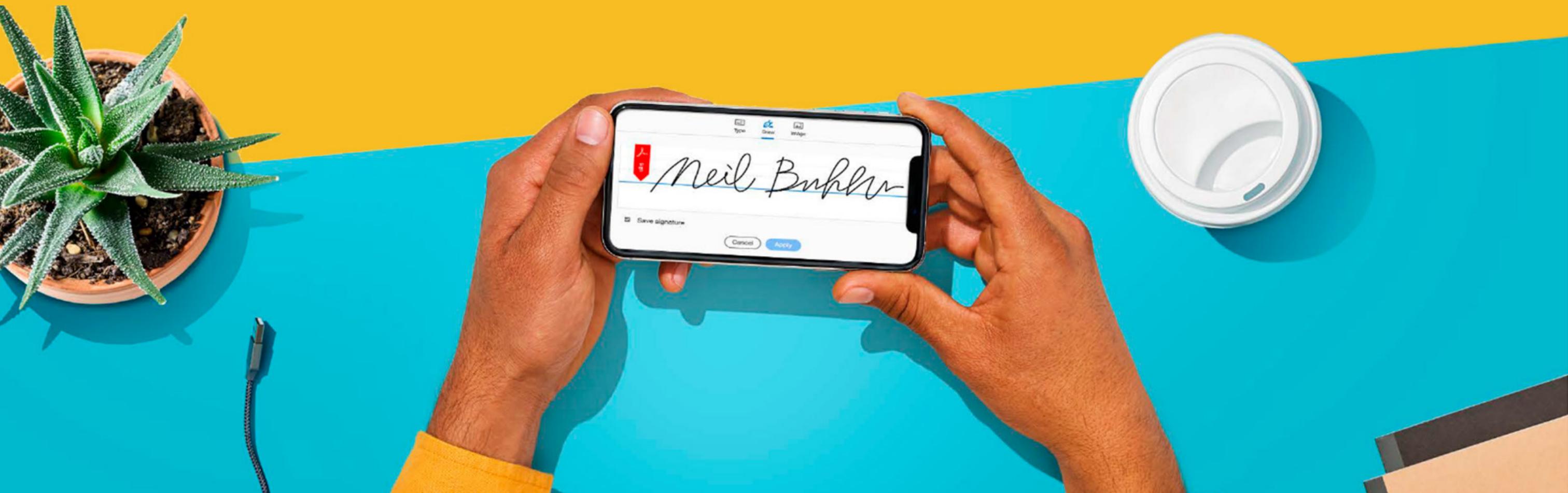
Influencers

How They Are Measured

- Student satisfaction
- Student test scores (K12)
- Graduation rates
- Job placement (Higher Ed)
- Innovation across curricula to attract, retain and better prepare students

- Recruitment of academic and administrative staff and ensuring they are delivering curricula that is measurable and meeting defined outcomes
- Retention of deans, faculty, teachers, and support staff – managing salaries and budget

Document Workflow Challenges

- Silos across departments or groups
- Inability to properly find or track student data needed for measurement
- Poor experience for students and parents created by paper

- Limitations of Acrobat
- Security and compliance concerns with student data
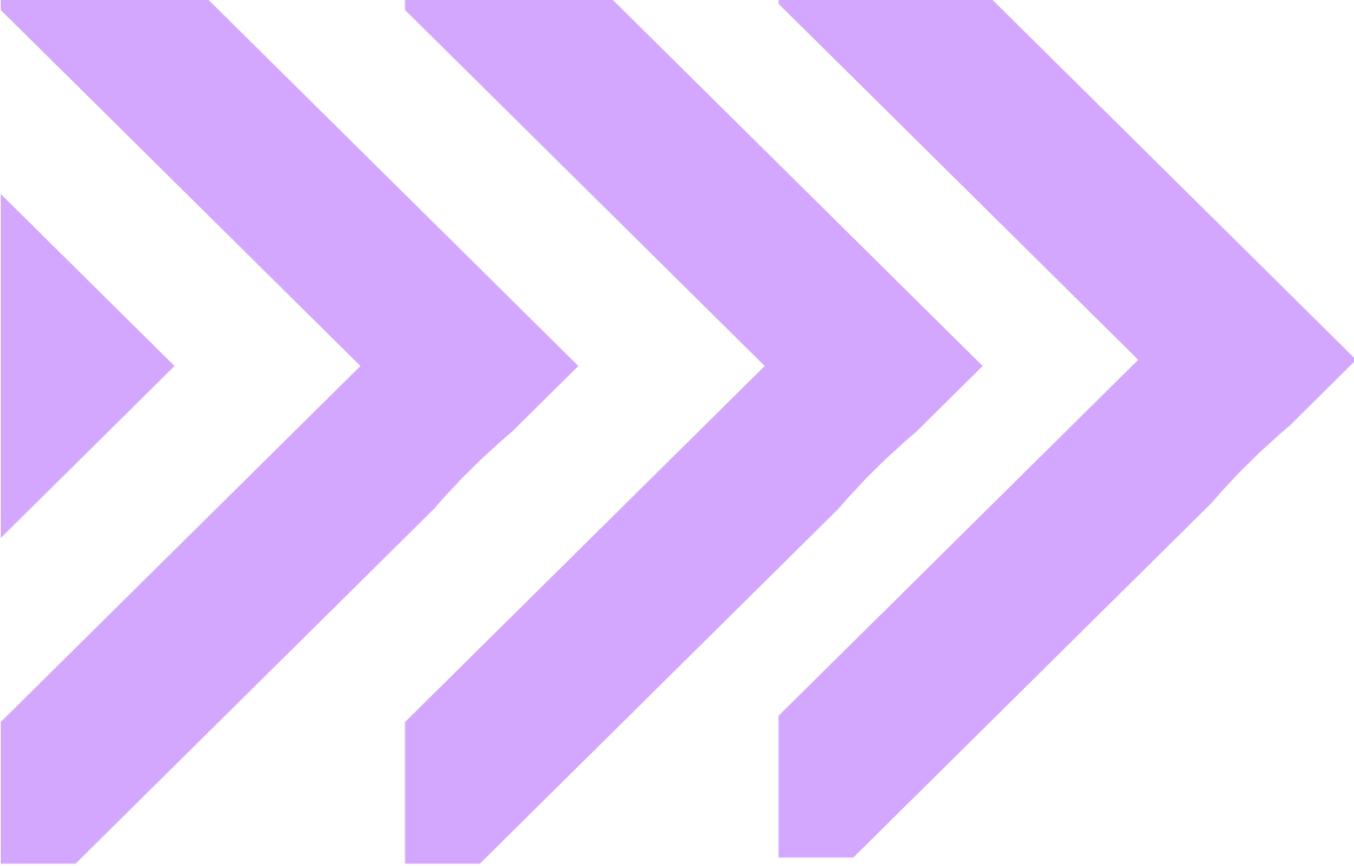
Influencers

Questions to ask:

01 How much time and budget could your educational institution (or department) free up if copying and delivering of documents were eliminated on your campus?

02 If budgets weren't a constraint what workflow or technology would you be investing in for your organization?

03 How does your institution protect sensitive information? How does your institution protect intellectual property?

04 How are you currently storing and managing your documents? What are the pain points of this current approach?

05 How easy is it for you to find critical documents and information? And what happens when you can't find what you need?

06 If you recognize this challenge with paper, who do you need to work with you to make this a priority?

07 Who is responsible for managing the way you handle your documents? And specific workflows?

Implementers

Common Titles

- IT Director
- Systems Administrator
- IT Manager
- Tech Specialist

Objectives and Responsibilities

- Admin, deployment, maintenance of IT systems
- Providing day-to-day tech oversight and management
- Being prepared for environmental shifts and challenges (such as COVID)
- Maintaining operational continuity
- Requirements gathering from user departments

Implementers

How Are They Measured

- Meeting budget or a good return on investment
- Utilization of new technology
- Ease of onboarding or change management

- On-time implementation
- Simplicity of the solution for the users – don't want to invest a lot in training, support, etc.

Document Workflow Challenges

- Simplification of complex deployment and maintenance of tech, including cumbersome manual or homegrown IT solutions
- Measuring and increasing usage of tech tools and apps
- Access for students, especially non-traditional students

- Balanced portfolio of ed-tech products while protecting student privacy and deploying prior to back to school
- Drive efficiency of systems while keeping costs down
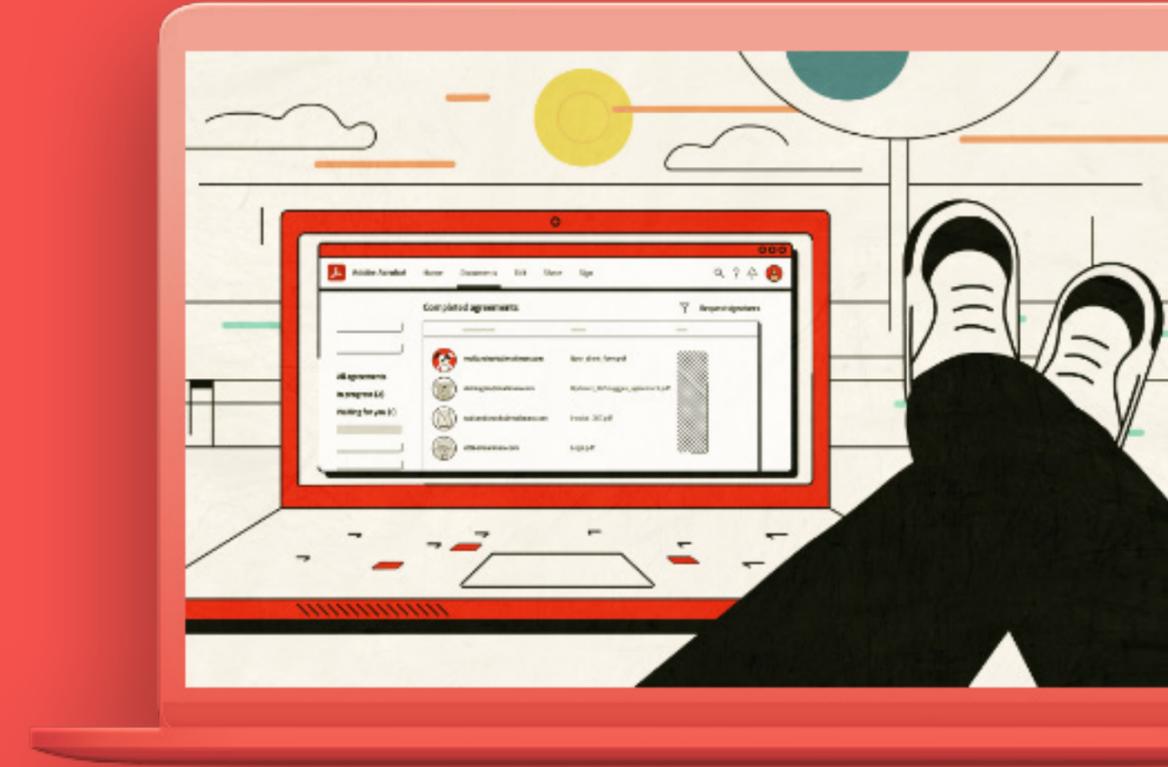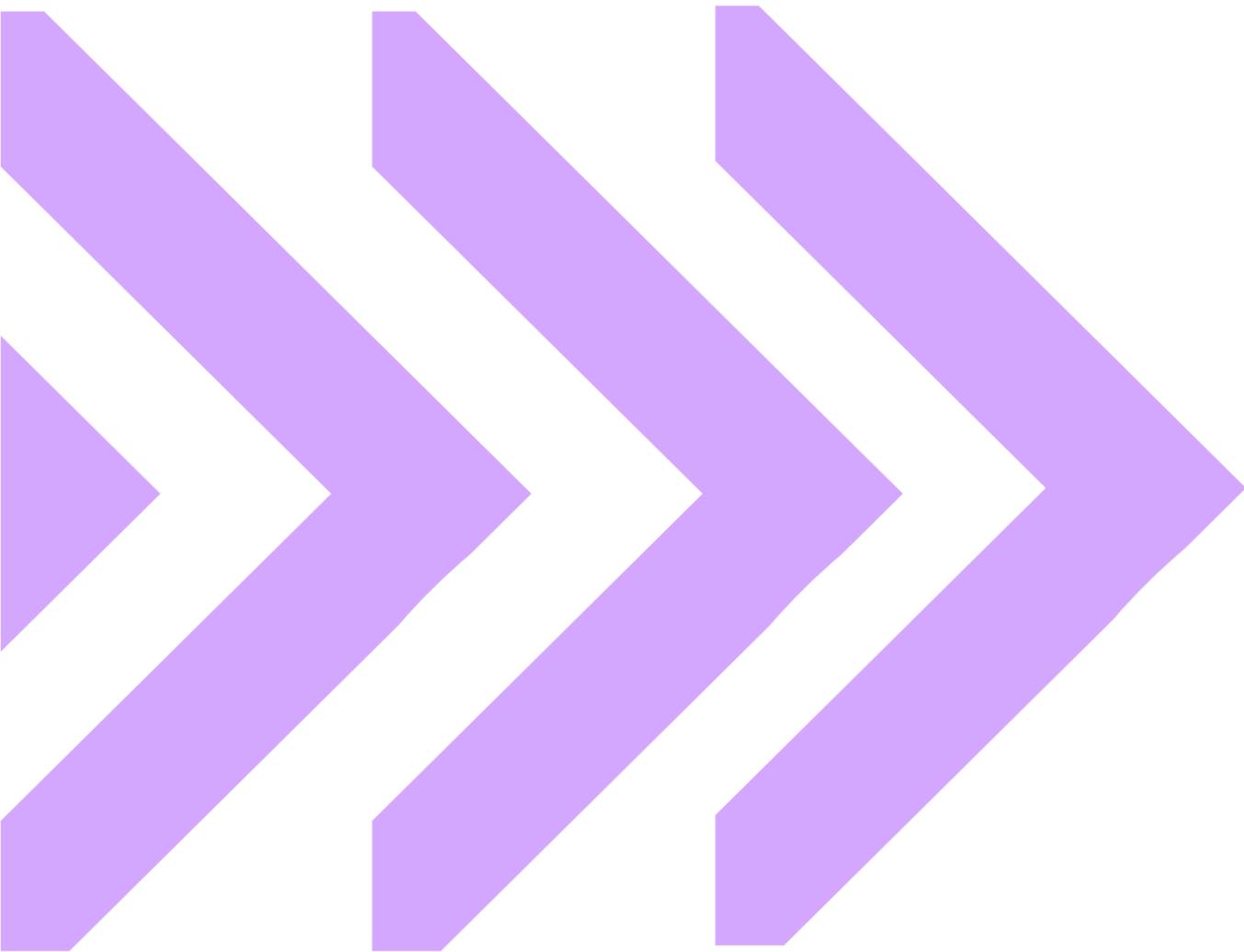
Implementers

Questions to ask:

01 What are the key tech solutions you're managing today?

02 What does your tech roadmap look like?

**03** What are you using today to manage documents or processes?

04 How do you protect information so that it cannot be viewed, altered, or used by others?

05 Do you need to integrate with existing repositories? If so, which ones?

05 Do you use Microsoft SharePoint, Dynamics, or Microsoft 365?

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Key Positioning
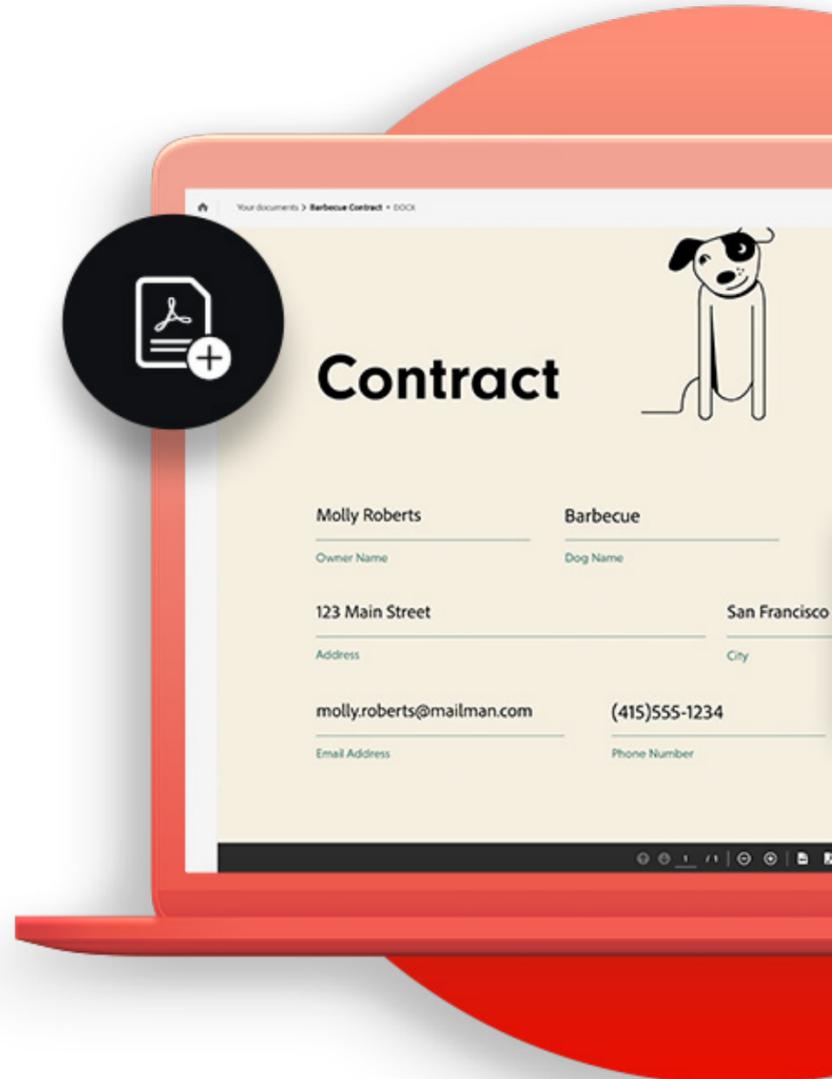
Why Adobe Sign?

Key Differentiators

Trusted Adobe Brand

- Adobe has more than 20 years of education partnership.

- Adobe products used extensively worldwide with over 2.5 trillion PDFs in the world.

- Adobe Sign is fully integrated within the Adobe portfolio (Acrobat, Creative Cloud, Document Cloud, XD).

- Having a single vendor creates ease of management.

- Best-in-class support and implementation services are included.

- Adobe enables rigorous compliance.

Adobe Sign Use Case

Foothill De-Anza Community College District has used Adobe Sign to build a 100% digital application process, which is 90% faster than its previous paper-based system.

Why Adobe Sign?

Key Differentiators

Designed to Integrate

- Adobe is continuously innovating (such as artificial intelligence, end-to-end digital experience).

- Adobe Sign is the preferred e-signature partner of Microsoft.

- Adobe Sign includes top-rated integrations and APIs for the apps and systems that educational institutions use most frequently.

Adobe Sign Use Case

Iowa State University Foundation uses Sign with Microsoft to process alumni giving agreements and has seen a 30% reduction in printing leading to lower costs and less paper waste.

Why Adobe Sign?

Key Differentiators

Flexibility to Scale

- Adobe offers flexible buying programs through VIP

- Adobe's pricing includes support, integrations, and implementation.

- Customers are not locked into the Adobe ecosystem.

- Usage scales from very basic processes up to very complex implementations.

Adobe Sign Use Case

At San Diego State University forms are completed in 93% less time as a result of implementing Adobe Sign.
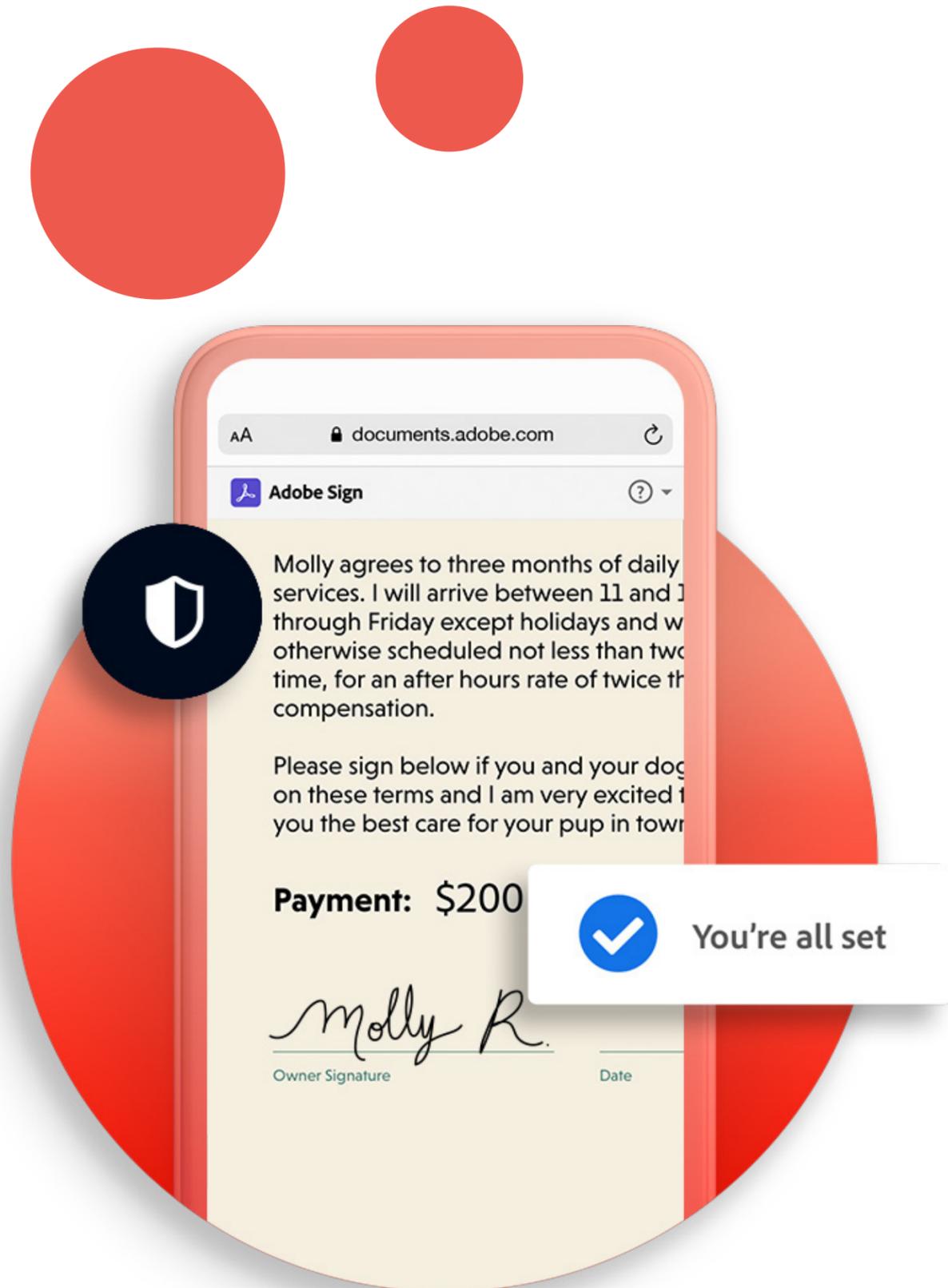
Conversational Tactics

Direct the Adobe Sign Conversation

Drive Operational Efficiency

Change Insight

- Only 47% of schools use e-signature as standard practice.

- Unfortunately, paper-based processing involves an arduous and time-consuming approach of printing, signing, scanning, emailing—repeated for every signature required.

- This approach makes authentication, tracking, and storage very challenging.

Provocation Questions:

01 How much time do you think staff spends filling out various forms? How much time do you spend tracking them? How much time is spent managing forms?

02 How much do you think you spend on printing and mailing supplies?

03 If you were to ask both students and staff if your use of technology was meeting their needs, what would they say?

Direct the Adobe Sign Conversation

More Secure & More Compliant

Change Insight

You're managing very confidential information (especially with forms like IEPs) and need to ensure these forms are secure. Unfortuantely, most institutions have challenges that stand in the way:

- Paper creates a lot of risks – data can easily be seen or exposed.

- There can be errors in entry.

- Compliance with many rules and regulations can be inhibited by paper.

Provocation Questions:

01 What security or compliance concerns you? What concerns take priority in your mind?

02 How do you feel about your document security, traceability or compliance?

Direct the Adobe Sign Conversation

Built to Integrate

Change Insight

- Introducing new solutions is challenging – lots of change management work needed.

- Solutions that easily integrate within existing workspaces are much easier for staff to use and contribute to overall satisfaction.

Provocation Questions:

01 How many systems do you work with? What do you use for what? We find that most schools have used Sharepoint for years–is that true for you? What administrative functions do you have built on Sharepoint today?

02 Where do your faculty and staff find information?

03 What hurdles inhibit the full use of the solutions you use?
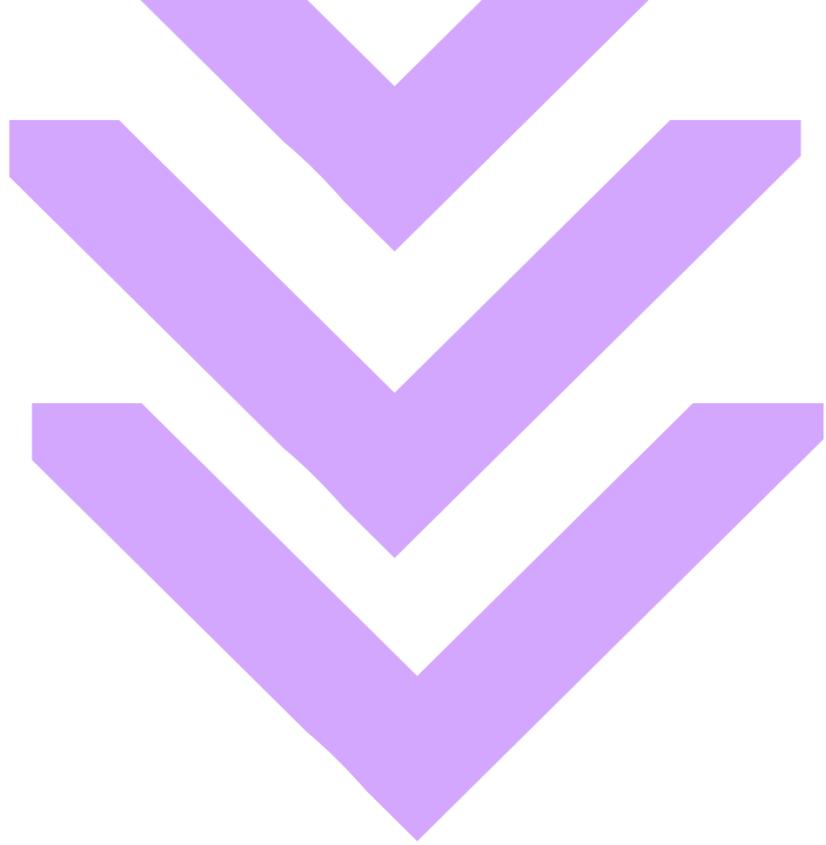
Objection Handling

"Are Acrobat signatures legally binding?"

Electronic signatures are legally valid and enforceable in almost every industrialized country in the world. Adobe meets rigorous world-class security and compliance standards and stores all customer data in geographically dispersed data centers with state-of-the-art access controls. And all data and documents are encrypted both in motion and at rest. Learn more at the **Adobe Trust Center**.

Clarifying Questions:

01   What are the requirements for compliance that you have?
(Provide clarity regarding Fill and Sign vs Request Signature.)

Objection Handling

"We already use a competitive solution."

**"We are evaluating DocuSign or another competitor."**

"I've heard of DocuSign. What's the difference between DocuSign and Adobe Sign?"

DocuSign is a great choice, but let's talk about what you need. We want to determine the product that gives you the best value and addresses your pain point. Then, you can do your evaluation and make the choice that is best for your business.

Clarifying Questions:

01   What are the criteria you are using for making your decision? Who in the organization is part of this decision? (Identify what is relevant for the person you are meeting with and their objectives. Determine if they are a champion, gatekeeper or someone just collecting data.)

02   What are the use cases and what you think is the most relevant aspect in your evaluation–this could be about support.

03   Do you do business across international borders? (Lead into Adobe advantages for international operations – more technical conversation that varies by region. The timing of when we talk to a DocuSign customer is key. Unless they have been with DocuSign for a year or more, they are unlikely to be aware of all the hidden costs.)

04   I can tell you why people choose Adobe if you are interested. (Use your Why Adobe and Success Stories content.)
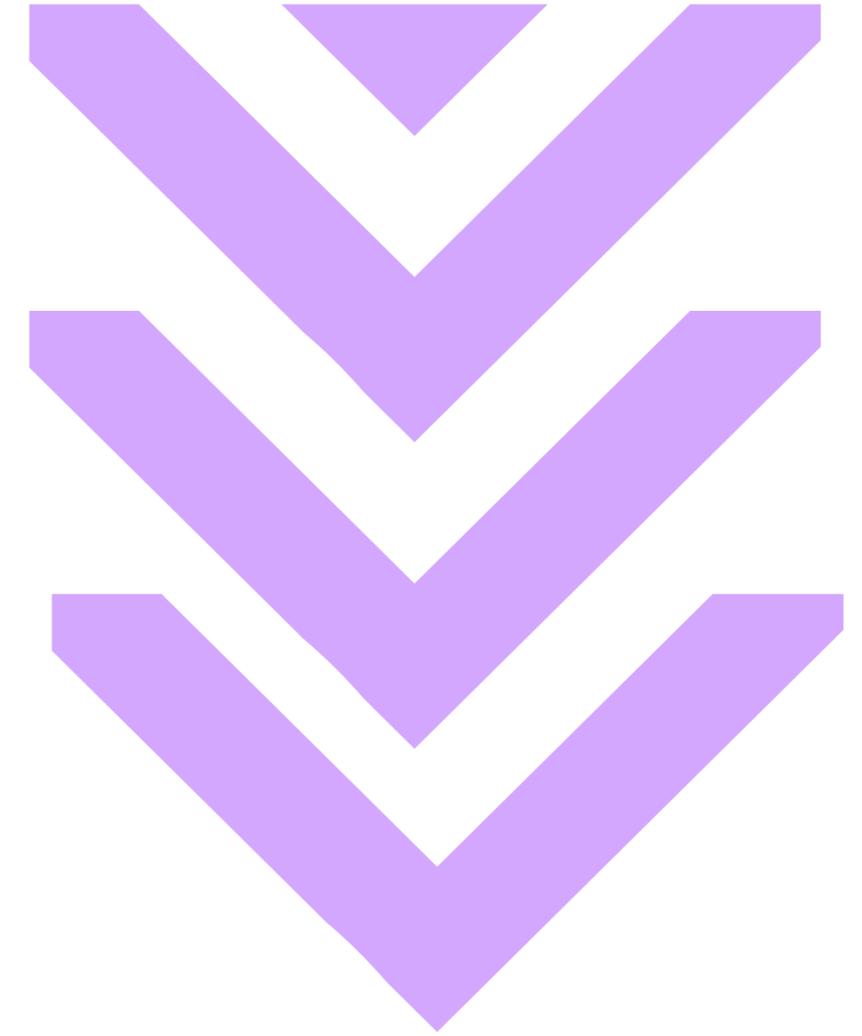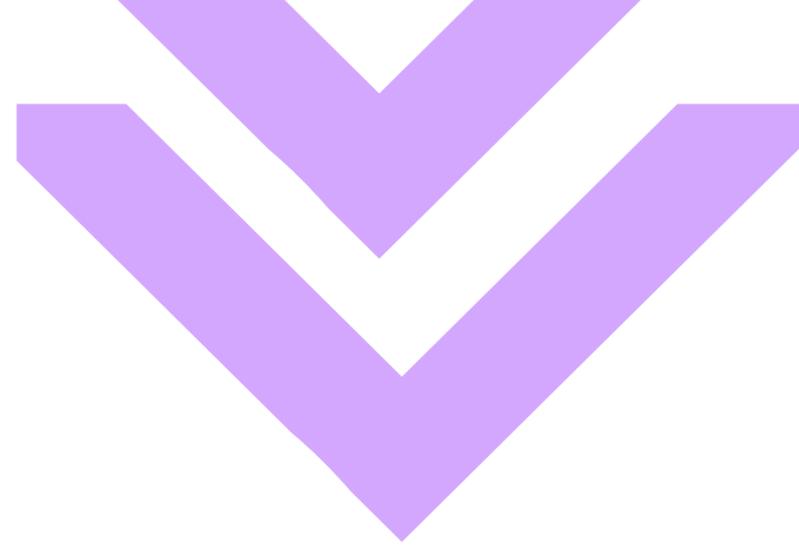
Objection Handling

"The status quo is fine."

"Our current process provides us with everything we need."

"We don't have a huge need for this type of solution."

"We are not looking to go digital. We don't have a digital transformation initiative."

- **Leading companies save $6 per signed document with Adobe Sign, which leads to an average ROI of 420% over three years.**
  Source: Forrester Consulting, "The Total Economic Impact™ Of Adobe Document Cloud," August 2019.

- **Adobe Sign saves users 1.5 hours per transaction and decreases cycle time from 7 days to 2 hours—a 96% reduction.**
  Source: Forrester Consulting, "The Total Economic Impact™ Of Adobe Document Cloud," August 2019.

- **In research conducted by Forrester Consulting, respondents from organizations with no digital document processes reported 10x more at-risk customers and 2x more at-risk revenue than those from other companies.**
  Source: Forrester Consulting, "Digital Document Processes In 2020: A Spotlight On E-Signatures," August 2020.
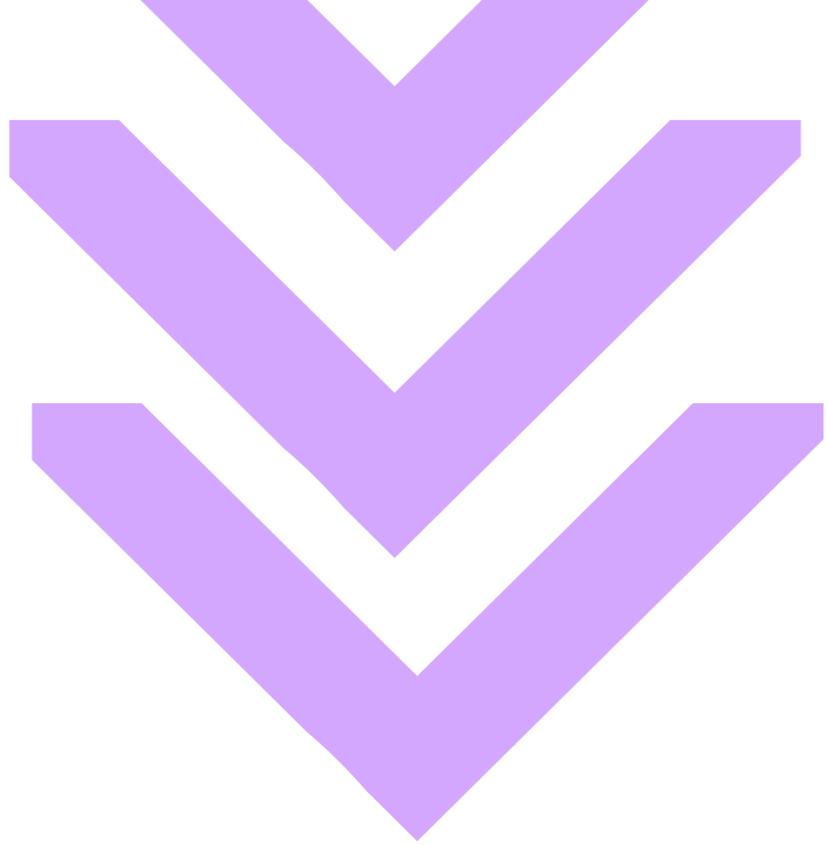
Objection Handling

"We already have Acrobat DC with e-signature capabilities. Why do I need to purchase Sign NUL or transactions?"

- That user model is designed for smaller organizations. It has a higher unit cost.

- Adobe Sign for Business is for individual users as opposed to an organization. So, if an organization needs e-signature capabilities for several users and they need audit trails, they should purchase Adobe Sign in VIP named user licenses (NUL) or transactions.

Resources

Sales & Marketing Tools

**Utilize the following resources
to enable your Adobe sales efforts**

Visit the Adobe Information Center for even more tools & resources.

Adobe