



SOLUTION BRIEF

# Adobe Acrobat Sign x Microsoft for banking

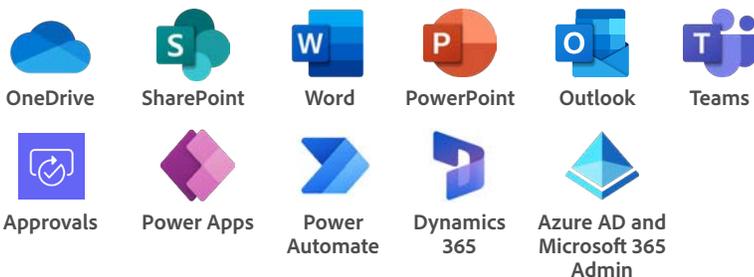
Simplify the banking experience with trusted, legal e-signatures with Acrobat Sign integrated directly into Microsoft solutions.

To maintain and grow their customer base, banks are increasingly focused on providing exceptional experiences while maintaining compliance and profitability. Rapidly replacing inefficient, time-consuming paperwork with secure workflows has become a priority. Choosing technology that meets security and compliance requirements is a necessity. Banks are building digital capabilities with [electronic signatures](#) (e-signatures) to deliver all-digital experiences that are easy, efficient, and mobile friendly. For banks that rely on Microsoft, integration with Microsoft solutions is critical.

## Make signing and approval workflows fast and easy.

[Adobe Acrobat Sign](#) integrated into Microsoft applications helps digitize end-to-end signing processes from document creation, collaboration, and execution to archiving and management—speeding [signature workflows](#) and reducing costs. With Acrobat Sign and Microsoft, you can reduce signing and approval processes from days to minutes, improve efficiency, and let people sign with [globally compliant e-signatures](#) anywhere, on any device. Banks worldwide are choosing Acrobat Sign integrated into Microsoft applications to automate signing processes because of its intuitive user experience, flexibility, and strong security.

## Acrobat Sign integrates into the Microsoft applications employees and clients use every day.



## Microsoft Partner

2021 Partner of the Year Winner  
Apps & Solutions for Microsoft Teams Award



## Together, [Acrobat Sign](#) and [Microsoft](#) deliver.

- **Easy, secure signatures**—Easily add e-signatures using turnkey integrations into Microsoft Teams, SharePoint, and Azure AD.
- **Custom workflows**—Enhance collaboration with integrated, custom workflows in the tools employees use every day across the Microsoft product portfolio.
- **Automated documents**—Generate agreements, forms, and applications automatically with Microsoft Power Automate, Collaborate, SharePoint, Acrobat Sign, and Adobe Document Services (APIs).
- **Unparalleled collaboration with Microsoft Teams**—Review documents with clients in face-to-face meetings and have them signed live with Acrobat Sign for Microsoft Teams.
- **Remote online notarizations**—Notarize documents faster and easier with Acrobat Sign software's [integration with the Notarize platform](#).
- **Superior business integration solutions**—Add workflows to your existing systems, processes, and applications through integrations with solutions such as Workday, ServiceNow, and more.



Security and authentication are a lot better because anyone can forge a signature with wet ink. But with Acrobat Sign, it all revolves around identity, and we have it integrated with Microsoft Azure AD to help with identifications.”<sup>1</sup>

## Acrobat and Microsoft applications work together across the entire client lifecycle, from onboarding to prospecting and sales to service.

### Client lifecycle use cases

Onboarding	Sales	Service
<ul style="list-style-type: none"> <li>• Client onboarding</li> <li>• New account applications</li> <li>• Self-service</li> <li>• Loan application forms (mortgage, credit card, auto, and commercial)</li> </ul>	<ul style="list-style-type: none"> <li>• Disclosures, appraisals, and welcome packages</li> <li>• Remote online notarization</li> <li>• Service agreements</li> <li>• Asset movement (transfers, LOAs, wire transfers, payment requests)</li> </ul>	<ul style="list-style-type: none"> <li>• Account maintenance</li> <li>• Change orders</li> <li>• Notifications (regulatory compliance, account, service and policy changes)</li> <li>• Renewal agreements</li> </ul>

## Banks are leveraging e-signatures with Adobe Acrobat Sign and Microsoft throughout their organizations.

### Banking departmental use cases

Procurement	Human resources	Legal and compliance	Finance	Information technology
<ul style="list-style-type: none"> <li>• Vendor agreements</li> <li>• Contracts</li> <li>• SOWs</li> <li>• Purchase orders</li> <li>• Receipts of goods/services</li> <li>• RFP sign-offs</li> <li>• Supplier compliance</li> <li>• Vendor onboarding</li> <li>• Internal approvals</li> </ul>	<ul style="list-style-type: none"> <li>• New hire packages</li> <li>• Offer letters</li> <li>• Benefits enrollment</li> <li>• Candidate NDAs</li> <li>• Contractor agreements</li> <li>• NDAs</li> <li>• Change of beneficiary forms</li> <li>• Leave forms</li> </ul>	<ul style="list-style-type: none"> <li>• NDAs</li> <li>• Contracts</li> <li>• Internal compliance</li> <li>• Outside counsel agreements</li> <li>• ADA compliance</li> <li>• FLSA compliance</li> <li>• Inspections and audits</li> <li>• Legal case management</li> <li>• Licensing</li> <li>• Finance agreements</li> </ul>	<ul style="list-style-type: none"> <li>• Payroll processes</li> <li>• Budget approvals</li> <li>• Invoices</li> <li>• Expense reporting</li> <li>• Travel reimbursements</li> <li>• Direct debit mandate</li> <li>• Audit sign-offs</li> </ul>	<ul style="list-style-type: none"> <li>• Project budget approvals</li> <li>• Asset management</li> <li>• Vendor agreements</li> <li>• Change authorizations</li> <li>• Requirements sign-offs</li> <li>• Incident reporting</li> <li>• Maintenance authorization</li> </ul>

### Adobe named a Leader in the IDC MarketScape: Worldwide eSignature Software

“Consider Adobe if you are looking for a robust, global, enterprise-class signing solution that can be integrated with a broad range of applications and support a large number of use cases.”<sup>2</sup>



1. “Adobe Acrobat Sign and Microsoft Accelerate Time-To-Business With Integrated e-Signing,” a commissioned spotlight conducted by Forrester Consulting on behalf of Adobe, January 2022.

2. IDC MarketScape: Worldwide eSignature Software 2021 Vendor Assessment, Doc #US46742320, September 2021.

## Empower clients and employees through teamwork.

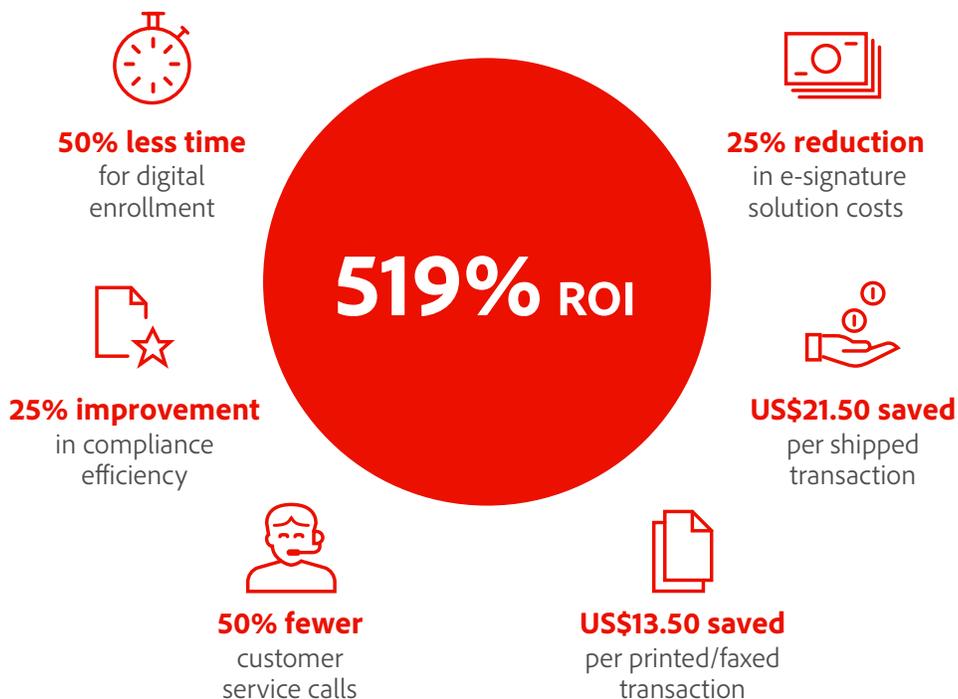
Acrobat Sign integrated into Microsoft applications helps increase collaboration and productivity by using the right tools in the places people work every day. Clients and employees gain more agility and speed as they are empowered to:

- **Prepare documents for signature**—Quickly turn Microsoft 365 documents, paper, or static PDF forms into fillable, signable forms with the help of artificial intelligence, powered by Adobe Sensei.
- **Request signatures from others**—Send to one or more recipients, in any order. With a few quick clicks, they can review and e-sign-anytime, anywhere, on any device.
- **Create data-populated templates**—Auto-populate documents based on preset templates.
- **Track and manage**—Track [document status](#) in real time. Get notified when people sign. Send reminders and maintain an audit trail automatically.
- **Simplify and speed signature workflows**—Use intuitive visual design tools to create easy-to-follow custom workflows with templates reviewed by compliance and legal. Easily deploy standalone, self-serve web applications for signature-based processes.
- **Long-term document retention**—Validate documents and their signatures for up to 10 years with Acrobat Sign.



The key benefit is the hours saved for frontline workers. There's no longer a need to prepare paperwork [or] chase multiple signatures, and there's a lot less customer back-and-forth.”<sup>3</sup>

### E-signatures dramatically reduce costs and turnaround time while providing experiences that delight customers and agents alike.<sup>4</sup>



3. "The Total Economic Impact of Adobe Acrobat Sign," a commissioned study conducted by Forrester Consulting on behalf of Adobe, January 2022.

4. Adobe Acrobat Sign and Microsoft Accelerate Time-To-Business With Integrated e-Signing," a commissioned spotlight conducted by Forrester Consulting on behalf of Adobe, January 2022.

## Deliver differentiated client experiences.

With Acrobat Sign integrated into Microsoft applications, you can transform client processes interrupted by manual and paper-based steps into 100% digital document workflows. Send documents for signature with a single click—signers can e-sign documents from anywhere using a web browser or mobile device. You can:

- **Provide a quick and easy application process**—With Acrobat Sign and Microsoft Dynamics 365, deliver complete digital applications and onboarding processes that are fast and minimize errors.
- **Customize signing experiences with your bank's brand**—Use your bank's logo, tagline, colors, and key messages and templates to fully [customize the experience](#).
- **Personalize at scale. Send a single document to many people**—Send any form or document to [multiple people to sign](#) and return. Each recipient gets a personalized version to sign.
- **Help ensure security with two-factor authentication**—Add an extra level of verification to signature workflows with a password, phone authentication, a government ID such as a driver's license or passport, or knowledge-based authentication (KBA).<sup>5</sup>

“ For Microsoft apps like Teams or Outlook, by piping through Acrobat Sign for users to access, it bridges the gap for them using e-signatures on a regular basis.”<sup>6</sup>

## Thanks to Acrobat Sign and Microsoft, TSB Bank reports:

- 140K forms processed in 3 months replaced 15K visits
- 21 digital self-service forms launched within months
- 9% increase in self-service rates

### Products:



“ We've been able to introduce several self-service solutions, whether applying for new products, changing personal details, or applying for government loan programs. These solutions have been used over 250,000 times since their introduction, allowing customers to apply for much needed help quickly.”



Mike Gamble, Director of Analysis and Design, TSB Bank

## Adobe Acrobat Sign is Microsoft's preferred e-signature solution.

Get documents signed faster than ever with Acrobat Sign. With out-of-the-box integrations in Microsoft Teams, Dynamics 365, and more than 100 other leading solutions, digitizing signature workflows has never been easier. Send, sign, and track documents with the trust and compliance of Adobe and Microsoft. Adobe e-signatures are secure, globally compliant, and [legally binding](#) in nearly every industrialized nation.

To learn more about how Adobe and Microsoft can benefit your organization, visit our [Adobe Document Cloud and Microsoft partnership page](#). Or learn more about [Adobe Document Cloud for Financial Services](#).

5. KBA is only valid for vetting the identity of US-based recipients.

6. Adobe Acrobat Sign and Microsoft Accelerate Time-To-Business With Integrated e-Signing," a commissioned spotlight conducted by Forrester Consulting on behalf of Adobe, January 2022.

