AssureSign

eBook:
Getting started with eSignature Technology

A Step-by-step Guide for

Implementing Electronic Signatures

SMS

Contents

Introduction

There are many things that we can look back on fondly about 20th century life that have significantly changed in this new digital world. Just to name a few, we've seen the transformation of music, telephones, accounting, research, books, data, and connectivity.

These things that have been transformed before our eyes have at least one thing in common: the content that they deliver remains the same. We still listen to music, talk on the phone, enter numbers, look for information, save data, and relate people and items to one another. However, the way we do all those things has changed. Many would argue those things have changed for the better, no offense to fans of vinyl records, wall-mounted phones, filing cabinets, and keeping the books literally in a book.

Why should signatures be excluded from this trend of changing the process for the better? There are many reasons wet, blue ink is resistant to change. It's the real thing. It's genuine. It's original. Or is it?

How many organizations made full use of signature stamps 10 years ago? Isn't the signature stamp the equivalent of the 8-track tape when compared to vinyl? It's an accurate representation of the real, genuine, original signature, but just not quite as good. Yet signature stamps were - and still are - widely used to save time, effort, and - ultimately - money in the process of getting an important document signed.

In other words, that wonderful old wet, blue ink we love and require may not be the real McCoy we've been pining over all these years. It can't be verified. It can be very easily replicated (since that's actually the definition and function of a signature stamp). It can be stolen. In other words, it's completely *unsecure*.

So, as fond as we may be of our wet, blue ink on the contract, just like music, phone calls, data, and spreadsheets, electronic is better, faster, more secure, more efficient, and more cost effective. In other words, electronic is an improvement over analog, especially for our signatures.

As the words of AssureSign CEO, David Brinkman, clearly note, choosing to take your organization digital by implementing electronic signature technology is far more than just choosing a standard web browser or document management system. The benefits of utilizing eSignatures are many and they are big, so the implementation process should not be taken lightly. You truly are totally reconfiguring your business processes.

In this ebook, we will walk you through all the thoughts, criteria, decisions, and processes that you must undertake starting the moment you decide to consider electronic signatures, including:

- What is an electronic signature?
- What are the benefits of adopting eSignatures?
- What should you consider before making the transition?
- What to look for to choose the right eSignature provider for your business
- Steps for planning and conducting your implementation
- Helpful tips for making your transition to eSignatures a success

This ebook is meant for the decision makers of organizations who are considering the move to electronic signatures, though it could also be helpful to those who have begun the transition and found themselves out in the cold. And, while we at AssureSign are admittedly biased towards our own offering, this guide can and will help anyone choose the right eSignature vendor for their unique business needs, even if not AssureSign.

From our experience, we've learned that no two eSignature implementations are the same, because no two organizations are the same, even though they may be in the same geographical market, the same product market, marketing to the same audience, and in all other ways direct competitors. Every eSignature implementation is as unique as your organization.

1 An Introduction to Electronic Signatures

What is Electronic Signature?

Though the ESIGN Act was passed more than a decade ago (in 2000) making electronic signatures legally enforceable, many people don't know exactly what an electronic or "eSignature" is or how it can be used.

An electronic signature is "an electronic sound, symbol or process attached to or logically associated with a contract or record and executed or adopted with the intent to sign, as defined by the ESIGN Act." Accordingly, electronic signatures can be verbal authorizations, electronically signed authorizations, or even the simple click of a checkbox. But let's just get to the crux of the matter – the requirements of an electronic signature are threefold:

1 The signer is who he or she says (varied methods of attribution based on the needs of the business, however, none are legally required by US law),

2 The signer's intent to sign is captured (the method and purpose are clear the signer intends to sign), and

3 The document or record is verifiable. (this boils down to process; how was the document signed, what did the signer do, and how do you prove what is represented electronically is actually what happened)

Let's go through an example of how this works in practice. AssureSign client, Rhodes Retail Services, Inc., requires a paperless employee onboarding process, because many of their hires are virtual and scattered all throughout the U.S. As such, Rhodes Retail Services uses email and password authentication, allowing new hires to virtually sign and submit the documentation to headquarters, taking only a matter of minutes. The signer's intent is made clear through browser-based AssureSign signing process, and the new signed document is now verifiable because of the process through which the was sent, signed and returned, all of which is tracked and recorded using AssureSign's audit trails.

Since Rhodes Retail started using electronic signatures, the company has been able to reduce their on-boarding process from seven days to two. Additional perks of eSignatures include copies distributed to all parties and document audit trails.

Speed, efficiency, verifiability and customer experience are just a few reasons why entire industries have made the switch to electronic signatures. But "electronic" is not the same as "digital" when it comes to signatures.

What's The Difference Between "Electronic" and "Digital" Signatures?

Since the passing of the ESIGN Act of 2000, the prevalence of electronic signatures has significantly increased. To put it simply – what was once an enterprise luxury is now a basic business need. In fact, 65% of enterprises will retire paper-based processes in favor of those based on digital transaction management (DTM) by 2017, according to analyst firm Aragon Research.

While there's more eSigning taking place than ever before, many business users as well as consumers still don't know

> " *65% of enterprises will retire paper-based processes in favor of those based on digital transaction management by 2017*

what electronic signature is and how it is secured. Further, they don't know the distinction between eSigning, digital signatures and digital certificates – leading to confusion and concerns over security. So, let's start from the top: what is an electronic signature?

As mentioned earlier, an electronic signature is any sound, symbol or process that is electronically associated with a contract or record that is adopted by the signer, indicating his or her intent to sign.

How Does "Electronic" Differ from "Digital"?

Electronic signature is not the same as a digital signature, even though many use the two terms interchangeably. Digital signatures embed a unique digital "fingerprint" into documents and the signer is required to possess a certificate-based digital ID in order to link the signer and document. As such, digital signatures are often impractical to execute due to the advanced technology requirements of the signer. Electronic signatures, meanwhile, comply with the ESIGN Act of 2000 and the Uniform Electronic Transactions Act (UETA) making them extremely secure and legally enforceable, but also much more practical as signers can quickly execute agreements from the

office, home or a mobile device without high tech requirements.

When a digital document is sent and the signer has a digital certificate, he or she can share the public key with the document's originator and then enter their private key when signing. While this process does succeed in verifying signer identity, it is cumbersome, and often impractical because most signers do not posses these digital certificates. Moreover, digital certificates may not provide any additional security benefits other than signer identity verification.

What Laws Are In Place for Electronic Signatures?

What was once an enterprise luxury in the United States, electronic signatures are now nearly ubiquitous as a basic business need. This rise in eSignature can be attributed, in part, to the passage of the ESIGN Act but also to the rising numbers of mobile workers, "nearly 30% of employees are - anytime, anywhere - workers," according to Forrester Research. This spike in the mobile workforce puts pressure on businesses to provide options for executing documents while on the go.

In addition to the mobility factor, electronic signature has also seen greater adoption in the U.S. and other common-law countries thanks to the broad definitions outlining electronic signature in the ESIGN Act. The act provides a vendor-neutral framework for electronic signing stating that "a contract or signature may not be denied legal effect, validity or enforceability solely because it is in electronic form." It's this

definition in the legislation that makes electronic documents and records just as viable as their paper equivalents in the United States, allowing U.S. companies and individuals to speed up their business processes and save tremendous amounts of time, money and paper.

Common-law interpretations in the U.S., based on previous legislation enacted and case histories, allows for the ESign act to be interpreted and enacted liberally here. This relative legislative ease allows businesses and signers in the U.S. and other common-law countries (in Canada, the UK and Australia, for example) to adopt electronic signature more readily. This is, in part, why in the last three years, U.S. electronic transactions have grown by 53 percent and are slated to top 700 million transactions in 2017.

How Do Other Organizations Use eSignature?

Anytime a new technology, innovation, or specific process makes its way through several industries, those people who are always looking for ways to make their own improvements will seek out the best uses of the best new tools. Further, these

same people don't just jump on the bandwagon just to be cool. Rather, they first find out what improvements they should expect from any new process that they introduce into their organization.

Electronic signatures are no exception. Thousands of organizations have started or completed the transition away from wet, blue ink to electronic signatures in every aspect of their business processes. But what does that mean to you? Below are four of the most popular use cases for electronic signatures and the gains or improvements earned by the transition to eSignatures.

Sales Contracts - technology has revolutionized how business gets done and sales are made. It's a natural fit to completely remove paper from this process, since nearly everything else in the process is done electronically.

Change Orders - for existing customers and ongoing projects, when something - anything - changes, someone has to sign off on that contract because it usually means money being spent. Why spend more money and time moving paper across states and oceans? Furthermore, imagine if you had an audit trail on the last contract or change order that you sent out so you could see exactly where the change was in the signing process. ESignatures are not only more convenient, but help you to work smarter.

Field Services - the mobile workforce and mobile workers' ability to conduct every aspect of business from the field has increased dramatically, and will continue to improve. Electronic signatures are one of the more important tools that enables field service personnel to complete business in the field, rather than just conducting business.

Employment Onboarding - Why does the first day of work have to consist of nothing but signing paperwork? Electronic signatures can eliminate the loss of that first day productivity, and let every employee be productive from the start.

In every use case, eSignatures help organizations to improve in at least three ways: increase efficiencies, reduce costs, and mitigate risk.

Regardless of your use case, there are likely at least a few applications in your organization for eSignatures. Hopefully these use-cases helped you understand additional ways your organization might utilize eSignatures to be more efficient.

What Types of Industries Are Using eSignature?

We are in the midst of a movement away from wet, blue ink on contracts and towards electronic signatures. The reasons for the strength of this movement include speed, efficiency, verifiability, customer experience, and the cost of printing, shipping, and storing all that paper. Those are just a few of the reasons that entire industries have made the shift and transition to eSignatures.

Below is a list of the industries that jumped to bring eSignature into their processes and some of the applications for how they have put the technology to great uses.

Insurance - believe it or not, the insurance industry was one of the early adopters of electronic signature technology. At first, the players were not sure that their customers – you and me - would embrace electronic signatures, but the customers wanted to get their insurance paperwork done faster, and eSignatures moved that piece of the process along nicely.

Fintech - the world of financial technology has thoroughly embraced eSignatures for things like opening an account, transferring money, and agreeing to terms and conditions.

Government - government agencies has actively sought out electronic signature technology to become more efficient. The most common example is being able to file your taxes completely electronically because you don't have to sign the 1040 with blue ink anymore.

Schools - colleges and universities utilizing the technology make it much easier to enroll, get loans, and pay for classes without physical paper to sign.

Franchises - the reason a business embraces the franchise model for expansion is to expand into other markets. Electronic signatures fit perfectly into this model for completing agreements with franchises around the globe.

Across the board, the industries who adopt eSignature technology into their everyday business processes do so because it saves everyone time and money.

Why Would Any Organization Consider Moving to Electronic Signatures?

There are many reasons to transition from wet, blue ink to electronic signatures, and every organization's main and compelling reason will be slightly different. However, the most common drivers for making such a change to any organization are **cost**, **security**, and **customer experience**.

Cost

First, the costs involved in the requirement of having a signature on a document. The phrase "cost of doing business" is used so often we forget what it means. What are the costs of doing business, your business? One such cost is signatures. Yes, the physical act of signing a piece of paper costs money, mainly in the form of the paper that your customers are signing. Do you know what your cost of doing business without eSignatures is?

Paper Isn't Free!

Enterprises use paper. Lots of paper. Paper is part of the line item of "office supplies" to small and even medium sized businesses; however, paper is a cost center to the enterprise. According to Aragon, "enterprise businesses spend approximately 1-2% of total revenues on paper." Most enterprises see this trend, and are taking steps to change it. Aragon predicts, "By year 2017, 65% of enterprises will retire legacy paper-based processes in favor of those based on digital transaction management."

Consider all the different types of documents that you send out in order to "do business": sales contracts, change orders, field services, and employee/contractor onboarding, just to name a few. These days, there's a good chance that those documents are sent out electronically as a PDF or secure document. But then the recipients print, sign, and send them back through the mail, FedEx, UPS, or another courier. The time it takes for you to receive the documents back and the cost of physically sending them back add to your "cost of doing business."

Time is Money

Sales is a process bound by time. Just as the retail shopping experience was sped up dramatically by ecommerce, so the enterprise sales process - more accurately, the time it takes to complete the sales process with an agreement - can be decreased significantly with the use of eSignature technology. From Aragon, "Sales contracts that are signed electronically can have a dramatic effect on time to sign and as a result accounts receivables." Speed is always an advantage in any competition, and enterprise sales is no different. If your sales force can decrease the time it takes to close deals, your organization's effectiveness improves.

Then ask the question, how efficient is it to physically sign and send all these documents? What could your organization have accomplished for the customer in the time that it took to physically receive the signed documents back?

What Does A Customer Cost?

For example, in the banking or financial industry, does the customer like waiting for their account to be updated? Customer experience has a cost as well, and a great customer experience can be the difference between loyal customers who become advocates and customers who are easily wooed away by your competitors.

Calculating Costs

Paper, time, and customer experience all must be calculated into the cost of doing business. For that purpose, we've created an actual calculator to help you understand your cost of doing business with paper signatures versus your cost of doing business with eSignatures. The eSavings Calculator is simple and free, and answers 2 simple questions about your business:

- How much you're spending on paper-based processes per year
- How much you could be saving by switching to electronic signatures

You can use the eSavings Calculator here for free:
https://www.assureSign.com/assureSign-esavings-calculator

Security

Security is the another top concern among those organizations and industries moving towards electronic signatures. As eSignatures continues to race ahead to becoming a mass-market necessity, security – in particular the integrity of the signature throughout a document's circuit – remains a top priority for respected electronic signature providers, like AssureSign.

How are electronically signed documents secured?

AssureSign signers - from the owner of a "Mom & Pop" shop, to the large enterprise executive - gain peace-of-mind by knowing that their documents will maintain integrity at each interval of an e-document's course. When a user sits down to create an AssureSign document or form, a unique mathematical hash value is placed on the document. This hash value, which can never be changed or modified, prevents AssureSign documents from ever being tampered with. If unauthorized changes are attempted at any point, the unique hash mark will indicate such, deeming any variation from the original document initiated as invalid.

Secure In Transit

Security is put in place for while the documents are "in motion" (meaning as they move from one user to the next) as well. AssureSign uses 256-bit encryption to keep data secure while in transit from the originator to the signer and back. Each and every document also has a digital audit trail that records unique identifying information such as IP address, geo coordinates, browser, OS information and time stamp. These identifiers signal that the signer is, and can never be tampered with or altered. The audit trail ensures that each document is technically and legally unassailable, holding up in courts of law.

Maintaining such high levels of security and integrity is what has made our business so successful with businesses from sole proprietorships to Fortune 500 companies. At the same time, the convenience of electronic signature for the signers is what's made electronic signature rise in popularity to-date. For most people, electronic signature is the best choice and the most viable option for saving time and money.

Customer Experience

Businesses big, small, and medium are making the digital transformation for more than just what we in the business would consider "obvious" reasons. Some of the benefits may already be on your radar, including increasing efficiency and ensuring regulatory compliance, which lead to accelerated revenue and improved profitability.

But as the eSignature marketplace continues to grow, mature, and accelerate across the enterprise, we continue to see new applications and new benefits of making this change. First, however, we must return to a very old adage: "The customer is always right." Does that saying apply to your business? If so, consider this somewhat newer instruction: "*Think like a customer.*"

If you walked yourself through your enterprise sales process as a customer, would you love everything about it? Many times, companies make business improvements to answer all of the obvious enterprise necessities that we've previously named:
• Driving efficiencies
• Ensuring compliance
• Accelerating revenue
• Improving profitability

What about "improving your customer's experience"?

Now, let's go back to your sales process and implement electronic transactions from start to finish, including the signature required by the regulatory agency. How does that change affect not only your business efficiency, but also your customer's experience of signing on to do business with you? Would your customers be more satisfied if it were easier and faster to do business?

That's the ultimate reason to go digital: your customers. They're always right.

> " *If you walked yourself through your sales process as a customer, would you love everything about it?*

2   How to Find the Right eSignature Provider

Now that you've made it this far, you've probably realized that the electronic signature market is very active. There are many providers to choose from, and now it's up to you to choose the provider that works best for your organization. It's at this point that we embrace the competitive marketplace and say, "Let the best provider win!" We hope it's AssureSign, obviously, but the manner in which you vet your choice of vendors for this business process change should be open and honest from all sides.

Yogi Berra famously quipped, "When you come to a fork in the road, take it!" Unfortunately, choosing business software providers isn't quite so simple.

Adopting and implementing electronic signatures to increase the efficiency and profitability of your business is a great step, but not one to be taken lightly. Implementing eSignatures is very much like implementing a new CRM: your entire business process will undergo change. So, before you begin the implementation process, one of your first steps is choosing an eSignature software provider that fits your business, your culture, your technology, and your budget.

Four Questions to ask Prospective eSignature Providers

1   **Do they meet your deployment option needs?** There are three options to choose from when it comes to eSignature software.
  - Cloud - many small businesses today have abandoned having any IT infrastructure on their site, adopting cloud CRM, accounting, sales, marketing, and business process software and paying for it by the user or transaction each month.
  - On-premises - the software is deployed at your site on physical servers. The reasons for such a deployment are generally security or compliance with certain industry regulations.
  - Hybrid - large enterprises have many needs, and some of those needs can be met completely in the cloud; however, parts of the business may be subject to regulatory compliance. In such cases, a hybrid of cloud and on-premises deployment may be necessary.

2   **Do they offer the features you need specific to your business processes?** In order to understand what features you need from eSignature software, you'll need a solid detailed understanding of your actual business process that requires signatures, including things like:
  - What types of documents do your customers sign?
  - Where do your customers sign these documents?
  - What types of devices do your customers typically use?

3   **Does their pricing fit both your budget and your business?** Every business is different. Your business may have few internal users but thousands of eSignatures (transactions) per user, or it may be the other way around: hundreds or thousands of users but just a few monthly transactions per user. Choosing the wrong type of pricing model can end up costing you far more than you should pay. Ask potential providers for detailed analysis of what your software will cost you and how the cost is calculated.

4   **Do they integrate with your CRM, DMS, ERP or other systems directly or via API?** This question may be the most important one of all. If everything else is just perfect – deployment, features, pricing – but the provider's software doesn't integrate nicely (or at all) with the software you use to run your business, the engagement will be painful.

These questions should help you vet your choices of eSignature providers down to a short list. Then, it's time to get really specific with each vendor who is still in the running to earn your business. It's time to put your finalists through the gauntlet.

Arrange A Full Product Demo

Arrange a full blown demo of each vendor's product, so you can experience and learn about both the end-user platform as well as the admin interface. That's a key point: there are two sides to any eSignature platform:

- The end user interface, where your customers will sign documents; and
- The administrative interface, where your internal employees will accept signatures and organize signed and unsigned documents.

Both are important. Before, during, and after the demo, there are several things to carefully consider: security, pricing renewals, and support.

Security: How will your documents be stored and protected? That question should result in a very clear and solid answer. If your potential provider squirms at that question, it's time to move on. The question of security can also lead into questions about legality: has the document been changed? Is this the same document that was presented to all parties?

Pricing Renewals: How will each provider handle your team's growth? It's very common for an enterprise user to start small, gain adoption internally, and then add additional users once they get it set up and/or find more use cases for eSignatures within their organization. Some providers might charge an additional fee to add users, or even bump you into a higher pricing tier than when you started. Make sure

to ask in the beginning, to avoid any hidden fees.

Support: From a solid onboarding process to help your team get familiar with the equipment and document setup, through ongoing training as your team acquires additional use cases and users, a provider's support for you as a customer is a huge factor in determining the longevity of your organization's continued use of eSignature technology. Even if a particular vendor's marketing seems to meet all your requirements, that doesn't necessarily mean that they can handle any obstacle that might arise. Three common methods of providing support are:

- Knowledge Base – can you quickly look up answers to FAQs or how-to guides?
- Webinars – consistent (weekly or monthly) webinars aimed at teaching admins and end users specific and common tasks are easy and inexpensive for both parties.
- Account Managers – will you have a specific individual assigned to your account, someone you can call anytime, and, more importantly, someone who will respond in a timely manner?

After going through all of these questions before, during, and after an in-depth demo from any eSignature provider, your list should now be much shorter, and you should be closer to choosing your electronic signature software provider.

What Differentiates eSignature Software?

Aside from obvious differences in the actual companies, internally speaking, there are two major points of differentiation among the many eSignature software products themselves.

1. *How* the software integrates with your current systems & processes
2. *Where* the software integrates with your current systems.

How?

First, the "how". Your organization has chosen which business systems to use in the day-to-day operation of the business. Things like your CRM (Salesforce or Microsoft Dynamics 365), your business tools (e.g., Microsoft Office or Google Docs), email, etc., are the heartbeat of what makes your organization tick. Are you willing to change one, or many, or all of them to

implement a new business process? Probably not. Therefore, it's extraordinarily important to know, well beforehand, exactly how your new eSignature software can and will integrate with your existing technology.

The only way to *know* the answer to this question is to invite your finalists for eSignature software into your organization and "open the kimono" as they say. Both parties should sign a non-disclosure agreement for their own protection. Then there should be a very open and frank discussion about their software's compatibilities with every single one of the tools your organization uses in its regular operations.

For each tool or system, you should ask these questions:
1. Is your software natively compatible?

2. Is there an API?
3. How many times have you integrated with this tool, and may we please contact those clients to ask them how successful the integration was?

If the provider cannot answer yes to at least one of these questions (and certainly #3), it may be something to be concerned about with that vendor. It doesn't necessarily mean the end of the relationship, but it should be duly noted that this particular vendor might be weak in that area. They might be able to make it work, but you should know what you're getting on this side of the implementation.

Where to deploy: In the Cloud vs. On-premises

Electronic signature is often thought of exclusively as a cloud-based service. When the ESign act passed back in 2000, electronic signature providers begun to crop up around seven to eight years later. These providers were primarily SaaS-based electronic signature providers because they are quick and cost-effective for small and mid-sized companies. However, SaaS-only solutions were and still are virtually unusable for some enterprises, in particular those in regulated industries.

A Case for On-premises

For enterprise, the risks of the cloud often outweigh its many benefits. Of course, access to data, mobility, relatively low cost and startup time are attractive, but not at the expense of security, compliance mandates around data storage, green-screen legacy applications and extensive, complicated on-premises IT infrastructure.

For these reasons enterprises and regulated entities, like state and federal government agencies, that need control over their data, must adhere certain protocols to stay in compliance, and value security above all else - should opt for an on-premisess solution.

Hybrid Solution

While more organizations are looking to the cloud, regulated industries and enterprises can't go from on-premises to public cloud in no time due to security and infrastructure concerns, among others. For some, it may never make sense to go to the cloud. For others, the move may make sense but they'll need to transitional approach to moving their IT infrastructures to the cloud. These entities, then, are in need of eSign software deployed in-house or deployed via hybrid cloud, private cloud or a hardened cloud like Microsoft Azure's Government Cloud.

Few electronic signature providers offer on-premise and hybrid options; however, those that do are meeting the needs of these industries that prefer on-premise or are in need a gradual approach. Enter the hybrid cloud.

Hybrid cloud is a mix of on-premise data center and cloud-hosted apps and data. Hybrid cloud deployments offer the best of both cloud and on-premise, allowing for the use of the public cloud for some, less sensitive business applications that need to be accessed in multiple locations. However, sensitive data can still be stored and accessed on-premise. For these reasons, hybrid electronic signature deployments are preferable to 100% on-premise or cloud for many enterprises and government entities, providing for the desired control and security while harnessing the mobility and flexibility offered through the cloud.

The Cost Factor

Another key factor in considering cloud vs. on-premise is the cost factor. The question, from a cost perspective, boils down to, do I want to own it (pay for it once)? or rent it (pay for it forever)? Renting, or the traditional SaaS model, definitely has its benefits. Primarily, the convenience and limited cost if you have a limited scope, smaller number of eSign users or moderate transaction volume. In addition, the tax and budget advantages of being OpEx versus CapEx can also come into play. However, if you're an organization that does hundreds of thousands of transactions or deploy hundreds of seats, owning your eSign solution may be your best financial option. In addition to your data security being your own, you can control costs significantly by using your own hardware and IT infrastructure. Typically, during the course of three years of ownership, you save up to 50 percent, depending for how long you utilize the solution.

Deploy As You Like

AssureSign is one of the few electronic signature providers in the market that understands the needs of large enterprises and regulated organizations. Our approach to deployment is 'deploy as you like' because it's our belief that electronic signature software should integrate seamlessly into customers' existing IT infrastructures, and should be able to evolve along with the changing needs of the enterprise. It's why we have the electronic signature industry's most flexible APIs and why our customer service team out-delivers our competitors on deployments. Whether you need SaaS, on-premise, or a hybrid model, AssureSign can do all three.

3   Planning Your eSignature Implementation

How Long Will It Take? That's the question that everyone from the CEO to the busiest end-user wants to know: when will we be ready to roll? As with the implementation of anything in any organization, the answer to that question is, "it depends." Specifically, in the case of eSignature technology, it depends on two things:

1. The expectations you set
2. Your implementation team

Not only is every organization that implements eSignature technology very different, but every organization implements the technology differently. Industries tend to have similar requirements and workflows, but these can't be assumed. From small business to large enterprise implementations, no two are the same. These three steps - prior to beginning your actual implementation - will help to smooth your businesses transition from paper to eSignatures.

1. **Understand Your Business Processes and Workflows** - In order for an eSignature technology provider to properly assist the customer in the decision phase, the customer must understand their own workflows. Without that knowledge, the various options, technologies, and tools for eSignatures can't be properly offered or applied. Whether the customer is a small physician's office or a global retail operation, knowing their current process, step by step, and how they connect their customers to a paper signature is crucial to their transition to electronic signatures.

2. **Create a Realistic Implementation Timeline** - It is not uncommon for a Fortune 100 organization to take a couple of months to fully implement eSignatures due to the complexity of their own existing systems, software, and processes. However, with smaller companies it can be as little as a few days. Organizations making the transition would be wise to lay out a reasonable, realistic goal for implementation by creating a timeline for each step:

   a. Discovery & research to find your top 2-3 providers;
   b. Testing and integration to find the best fit for your needs;
   c. Training for your implementation team & additional employees;
   d. Launch date to begin going LIVE!

3. **Identify Champions Within Your Implementation Team** - There are three types of key team members required for implementing eSignatures: administrators, technical resources (software and/or IT), and end users. Within each of these groups, leadership should identify "champions", to be leaders of the implementation among their peers to help smooth the transition. These champions will be the trainers and first line of support to their peers.

The order of these steps is not significant. What is significant is the issues that may arise, both early in the decision process and late in the changeover process, if these three steps haven't been completed. Not only will your eSignature implementation be much smoother, but accomplishing these steps will also create new learning, efficiencies, and leaders within your organization.

The Most Important Ingredient in Your eSignature Implementation

Your new commitment to making your business more efficient will bring about exciting changes within your organization. Understanding that adapting to change can be difficult, to successfully implement eSignatures throughout your organization, you need a great team leading that charge.

As we mentioned earlier, you will need three kinds of people at your organization. Depending on the size of your company, that may actually mean three different people, one person wearing multiple hats, or it could mean three groups of people. Regardless, you'll want to identify these 3 key members for your Implementation Team. Below are the roles your team will need to fill.

Administrator(s) - The Admin role for eSignature technology could also be called its owner. This person (or people) will handle all the initial setup, coordinate branding of your eSignature documents, grant (and revoke) access for end

users, and be the first line of support for early adoption questions. This person will need to have a very open channel and solid relationship with your eSignature provider. For that reason alone, they should be involved early in the vendor decision process.

End User(s) - Who is going to be using your eSignature software on a daily basis today, tomorrow, next year, and the year after? However your organization is set up, you will have pre-identified your end users. These are the people who need the very best training on the product because they will be the customer-facing users of this technology. They need to be excellent representatives for your company with your new eSignature technology.

Technical Resource(s) - If you're planning to integrate the selected eSign provider with your current back office software, such as your CRM or DMS, this member has probably already been identified. For any tool that your organization uses, there will be specific integrations, APIs, documentation, and support requirements. The scope of their contribution will typically depend on the complexity of your integration, and your businesses specific use case. Whether you hire (or train) an in-house software developer or rely on a third party or eSignature provided developer, integration is key to optimizing your implementation and use of eSignatures.

> ❝ *The executives must lead the charge as the champions for a more efficient organization.*

Keep in mind that, ultimately, company leadership in the C-Suite is responsible for the success of eSignature implementation. The executives must lead the charge as the champions for a more efficient organization, but without administrators, well-trained end users, and talented developers, your chances of success are much lower.

Before you begin implementation, make sure you have these roles locked down, thoroughly trained, and well equipped to lead your company through this exciting change into the future. Once that future is here, the "technical resource" role will move rapidly to the forefront. Remember, you're not just installing software here. You're implementing business process change that is driven by software.

Getting Started

Generally speaking, a technical resource is either a software developer, IT pro, or a systems administrator. How well your technical resource(s) are able to integrate the new eSignature software will be key to optimizing your implementation and use of eSignatures.

Most eSignature providers offer several tools to help your technical resources quickly up to speed on implementing this new software. Below are the AssureSign resources available to every technical resource. You should ask all potential eSignature providers about these and any other technical integration resources that they can offer your organization.

Sandbox - Similar to a "Developer Account", a development sandbox gives the developer the resources to create and test the various connections that your organization requires in order to fully implement eSignatures.

Knowledge Base - A knowledge base is available to all users and developers for IT professionals to easily find instructions and explanations for connecting to Document Management Systems and CRM systems.

Webinars - Webinars for the sole purpose of teaching prospects and customers alike about new features, implementations, connections, interfaces, and integrations.

Technical Support - Typically throughout the onboarding process, customers have access to technical support staff for any and all questions and implementation issues.

Once the technical resource is ready, they will be the first line of defense within your organization for common technical implementation needs like, solution downloads and integrations, API configurations, and technical FAQs.

Your organization's technical resources – IT pros, software developers, or system administrators – are the glue between your eSignature provider and your own business systems. These individuals should be loaded up with every possible tool, guide, instruction, resource, and support mechanism they need to make sure your eSignature implementation works exactly as you expect, if not better.

Best Practices for eSignature Implementation

There are several best practices that are extremely helpful for companies implementing eSignature technology. The first two are listed below. The third is more of a policy decision, and pertains to internal user adoption.

Account Configuration - Understanding how your organization wants to be configured inside of the technology prior to the transition will make it easier to set up their account settings. For example, many businesses use eSignatures company-wide. However, they want to make sure that the finance documents are stored separately and securely from the sales and marketing documents.

We've put this reminder here, near the end of this ebook, to do just that: remind you that you should have already had a very deep technical conversation with your provider about your exact business processes. The more transparent you are, the more your provider can know about how you will utilize eSignatures within your current business operations.

Your Sandbox as a tool - Keep your sandbox account (testing environment) open once you become a customer for training new employees on how to use the tool. Since you are not typically charged for documents sent via the sandbox (for example, at AssureSign each document has a watermark 'sample' on them, so they shouldn't be sent to customers), the sandbox allows new employees, or employees using the product for the first time, to become familiar and learn how to use the tool without the company being charged.

Internal User Adoption - How will your employees embrace change? That question is far bigger than just eSignatures, but it is pertinent here as well. That's why we've provided three helpful tips to ensure a smooth transition within your organization.

1. Policy - communicate the decision as new company policy. That's easily said; however, every organization implements new policy decisions differently. We've heard of organizations having eSignature kickoff parties, where everyone gets trained and leaves with total understanding of the who, what, where, why, and when of the change. You do it your way, but make it very well known that this is where you've decided to go.
2. Reward - recognize your early adopters, the ones who jumped right on the bandwagon and set a great example for everyone else. Rewarding such behavior is yet another way of identifying leaders in your organization as well as moving the ball forward on your transition to electronic signatures.
3. Deadline - Nothing hurts like a date! Obviously, you can't just switch from blue ink to electronic signatures overnight, so decide on a date in the future on which every new process is conducted with eSignatures. Then relentlessly pursue and communicate that date to everyone in your organization.

No matter what you do or how you do it, the recipe for a successful eSignature implementation is ensuring you have all the ingredients ahead of time.

4 Success Stories

Every software provider from every corner of the market should provide success stories for the purpose of giving prospects and new customers context, assurance, and understanding about the implementation process and the core value proposition of that particular piece of software. Success stories are the equivalent of checking the references of a potential new hire within your organization.

For your edification, here are a handful of success stories from AssureSign.

Captorra Partners with AssureSign for Microsoft Dynamics CRM Integration; Enables Captorra's Customers to Close on First Call

Customer Profile
Captorra is the legal industry's leading case intake software solution. Captorra is used by bankruptcy, consumer, family, personal injury and mass tort legal practices across the United States. Captorra's technology enables law firms to expedite the client intake process, making it easy to collect critical client and case information from inside the office or via the use of any mobile device.

Situation
When deploying the Captorra product, the company's product team knew that they needed an electronic signature solution that would be easy for their law firm customers to use and shorten their lead close times. The eSign solution also needed to integrate with their underlying Microsoft Dynamics CRM. Electronic signature capability is critical to the overall Captorra product because the software's law firm users need to be able to have enforceable documentation throughout the client intake process and, due to the competitive nature of the industry, firms needed to be able to close client/case leads quickly.

Initially, Captorra selected DocuSign. However, in short order, Captorra discovered that DocuSign's lack of an out-of-the-box integration with Microsoft Dynamics CRM was a major limitation. Attempts to co-develop became too much of a hassle, leading Captorra's product team to restart the search for an electronic signature partner.

Solution
In 2013, Captorra chose AssureSign as its electronic signature partner due to its integration readiness and AssureSign's superior customer service team. Unlike others in the industry, AssureSign offered an out-of-the-box integration with Microsoft Dynamics CRM, making it easy for Captorra to employ. Integrating AssureSign into Captorra allowed Captorra's law firm users to close deals with new clients in a matter of minutes, rather than two to three days. Additionally, AssureSign's innovative team of engineers deployed product enhancements as Captorra suggested new features to the product team, furthering the two's partnership.

Benefits
Today, with eSign capabilities, Captorra's users have cut new clients/cases' on-boarding time from days to a matter of minutes. Additionally, Captorra user firms previously reported monthly shipping costs of upwards of $4K; those same firms have reduced shipping expenses to roughly $400 per month, on average. In terms of software sales, Captorra attributes eSign capabilities to well over half of their software purchases, as immediate signing capability is a key competitive advantage in the hyper saturated legal sector. In partnering with AssureSign, Captorra's team is empowered to introduce, qualify and close leads in a single phone call for the first time.

Captorra Success Story

AssureSign Enables 24-Hour Client Paperwork Turn-Around Time for Knight Insurance Group

Customer Profile

For 150 years, Knight Insurance Group has provided home, auto and business insurance to individuals and companies across the Midwest. The roots of the company extend back to 1859 when the Shawen, Stieg & Whitaker Agency incorporated in Toledo, Ohio. In those days, the company primarily sold fire insurance. Fast forward a century later and more than twenty acquisitions to the Knight Insurance Group of today – an insurance group that continues to deliver superior customer service by providing quality insurance products and financial services to individuals and businesses of all sizes. Knight Insurance Group operates in six Midwest locations: Cincinnati, Cleveland, Toledo and Findlay Ohio, Chicago, Illinois and Indianapolis, Indiana. Through the years, Knight Insurance Group's commitment to superior customer service has remained steadfast by providing quality insurance products and financial services to individuals and businesses of all sizes.

Situation

As an Applied Systems agency management (TAM) customer, Knight Insurance Group agents are already accustomed to the benefits of reduced administration times. Yet, Knight Insurance Group's agents – across all six locations – were still processing client paperwork manually; on average, it would take new clients two weeks to fill out and return applications. This process increased the likelihood for customer fall-off and kept administration times higher than the company desired. After reflecting on the process, Knight Insurance Group decided to look into how to keep all administration digital. Upon inspection, Knight Insurance Group system administrator John Gage began searching for new ways to execute all of the paperwork. During his search, Gage came across eSignature as a solution for streamlining the paperwork process and landed on eSign as the appropriate solution. "We decided then and there and we didn't want to ask our customers to print, scan or fax documents any longer," said Gage. "Instead, Knight Insurance Group sought to make the process of submitting paperwork easier than ever before for our customers."

Solution

Once Knight Insurance Group's search for an electronic signature provider was underway, systems administrator John Gauge collected vendor information at the annual AppliedNet conference. At the show, John was introduced to AssureSign, which was the only eSignature provider at AppliedNet that offered an out-of-the-box integration with TAM as well as full-service customer support. After selection, AssureSign electronic signature was deployed for Knight Insurance via the cloud and integrated into Applied Systems' TAM software. In just nine days, Knight Insurance Group's eSignature capabilities were fully extended across the agency's six locations.

> " *We're delivering a premier, fully modern experience to our customers.*

Benefits

Since launching eSignature through AssureSign, client forms that previously took two weeks to execute began coming in within one or two days, and 75 percent of forms are now returned within 24 hours of receipt. Additionally, Knight Insurance Group customers are reporting high levels of satisfaction with regard to the ease, simplicity and convenience of completing paperwork using electronic signature. "We're delivering a premier, fully modern experience to our customers," notes Gage. "The ease of electronic signature serves as just one more testament to our commitment to our clients' complete satisfaction when doing business with our agencies – for us, it's all about being the Agency of Choice for our customers and partners like AssureSign help us deliver the best."

Knight Insurance Group Success Story

Restaurant Franchise Dramatically Improves Signature Process with AssureSign's Franchise Offering

Customer Profile

Firehouse Subs® is a fast casual restaurant chain with a passion for Hearty and Flavorful Food, Heartfelt Service and Public Safety. Founded by brothers and former firefighters Chris Sorensen and Robin Sorensen, Firehouse Subs is a brand built on decades of fire and police service, steaming hot subs piled higher with the highest quality meats and cheeses, and its commitment to saving lives through the creation of Firehouse Subs Public Safety Foundation®. The founders are the real deal, the food is their creation, and the company is built upon a family of franchise operators who share their same passion for serving others. In 2014, Firehouse Subs debuted nationwide a new low-calorie menu, Under 500 Calories. Firehouse Subs consistently ranks No. 1 among fast casual brands in the categories of food quality, friendly service, and taste and flavor. In 2015, Firehouse Subs was ranked No. 1 consumer choice for welcoming and comfortable atmosphere by Technomic's 2015 Chain Restaurant Consumers' Choice Awards, and the brand produced the second-fastest growth in U.S. franchise units as ranked by Nation's *Restaurant News.*

Situation

As a franchise-based business, Firehouse Subs processes numerous documents, including Franchise Agreements, Deposit and Application Agreements, among others, requiring a signature process that is timely and convenient. The existing process was completely manual and involved printing franchise agreements, tabbing where each signatory was to sign, shipping to the recipient, calling them to advise to only sign the receipt page and NOT to sign the franchise agreement until the 7 day disclosure period had passed, checking in the document, verifying that it was signed and completed where required and then forwarding it on for internal signatures. It was a very long and costly process, largely due to shipping requirements.

Solution

AssureSign offered Firehouse Subs many advanced features, such as workflow templates, Send To AssureSign, and most

importantly for their organization, delayed signing to accommodate the FTC mandatory disclosure period prior to signing a franchise agreement. Since implementing AssureSign electronic signature software, Firehouse Subs' document authorization process has become easy and efficient; documents are imported into Send To AssureSign, templates are applied, and sent to the recipients, who are only able to sign the receipt immediately. Because of the delayed signing feature, they are unable to access the rest of the document until the specified number of days has passed. At that time, they are notified that they may access the document and complete signing. The signed document automatically continues along the workflow through Firehouse Subs' internal signers until complete. Once completed, all parties requiring a copy of the document receive it.

Benefits

The AssureSign document signing process is very simple and has eliminated many opportunities for errors, as well as the possibility of the disclosure period not being adhered to. In 2014, there were 158 Franchise/Area Development Agreements executed for Firehouse Subs restaurants. By using AssureSign, Firehouse Subs will be saving on shipping to various locations (i.e. paper, binders, singing tabs), and labor to prepare these packages. Additionally, Firehouse Subs plans to begin sending franchise agreements via AssureSign internationally.

"I cannot say enough about AssureSign's client services team in terms of intelligence, helpfulness and patience. They have taken a great deal of time to aid us in setting up our processes as well as all of the workflow and document templates," said Shelly Walsh, Firehouse Subs Franchise Accounts Manager. "They know the product inside and out and if there is something that they can't answer that second, they are quick to get the answer. Their responsiveness to calls and emails is top notch."

Firehouse Subs Success Story

Jacksonville Jaguars

Customer Profile

The Jacksonville Jaguars are a Florida-based professional football franchise. Members of the American Football Conference (AFC) of the National Football League (NFL), the Jaguars emerged out of league expansion in1995. Since then, the team has won two division championships – one in 1998 and the other in 1999. The Jaguars proudly represent Jacksonville, Florida, America's 11th largest city; and have a supportive fan base with home game attendance totaling 1,066,627 fans.

Situation

Each year, the Jaguars sales team sends out season ticket agreements to previous season ticket holders to solidify new agreements for the upcoming season; and, on average it takes a week or more to receive the returned, signed agreement. To expedite sales and to reach new fans, the Jaguars sought out a solution that could speed up the renewal of season ticket agreements. By doing so, the Jaguars would gain more immediate knowledge of fans that chose not to renew, thereby allowing them to engage with prospective season ticket holders more quickly. To make this happen, the Jaguars would need on-demand sending capabilities based off of customer information that existed on its CRM system.

The Jaguars sales team began the process of seeking out an electronic signature solution that could improve internal efficiencies by enabling quicker executions of season ticket agreements – via a paperless process. However the solution has to meet specific needs; it had to seamlessly integrate with its existing Microsoft Dynamics CRM and allow bulk sending and document management for thousands of agreements at a time.

Solution

After weighing the pros and cons of multiple vendors' and solutions, the Jacksonville Jaguars enlisted AssureSign in June of 2014 because it was the only solution to meet all of its sales team's unique criteria, in addition to it being simple to implement and use. With AssureSign's sophisticated APIs, the Jaguars sales team was empowered to reach fans by the thousands, through on-demand batches, including those who may not have been previous season ticket holders. Immediately after the transition from paper to eSign season ticket agreements, the Jaguars sales team began managing completed ticket waivers within 15-20 minute windows. They also had greater visibility into the massive number of agreements dispersed, so that they could more easily track and monitor unsigned agreements through tasks setup in their systems.

Benefits

In just two years since adopting AssureSign, the Jaguars sales team reports an improved sales process and increased season ticket sales. They attribute this to their newfound ability to reach larger customer segments quicker and easier, with AssureSign. By increasing the ability to send out ticket agreements to everyone in its existing CRM on-demand, the Jaguars were able to triple the amount of agreements sent out, without enlisting additional internal resources.

After successfully implementing AssureSign's eSignature capabilities into its ticketing sales processes, the Jaguars also intend to expand e-sig efficiencies into the game day fan experience as well. The Jaguars fan-experience teams plan to remove paper waivers that parents must sign for their children to participate in interactive activities before and during games, and replace the 1,000 sheets of paper with eSigned waivers. Ultimately, the removal of paper will decrease long lines and the need to sign waivers one by one, allowing young fans to engage in activities much quicker than ever before.

Jacksonville Jaguars Success Story

5 Quick Reference eSignature Glossary

When you investigate, adopt, and implement any new technology or business process, learning the terminology, or vocabulary, is critical to your team's understand, training and use of this new service. The same goes for adopting eSignature technology.

There are a few *industry* terms that are commonly used for the basic features by all providers, while there are other features that might be the same, or similar, but could have differing names depending on the vendor.

To help you and your team quickly and easily get to know AssureSign's Electronic Signature Software, we've prepared the top 14 terminology FAQs received from new and learning users, just like you:

- Electronic Signature (eSignature) - any sound, symbol or process that is electronically associated with a contract or record that is adopted by the signer, indicating his or her intent to sign, as defined by the ESign act
- AssureSign Envelope - a virtual container allowing multiple related documents to be presented to signatories for signing
- JotBlocks - areas in templates or documents that indicate where data will be applied or where data will be entered by a signer
- Template - an underlying document with applied JotBlock areas to help users quickly send the same document out for signature, without the hassle of adding these details each time (Includes email settings, workflows, and defines signing assignments, order, communication and timing)
- Signers - the individuals or representatives required to sign a document
- Signatory - Just a bigger word for "signer"; see humorous knowledge base definition here.
- Signature Pads - peripheral computer device used to capture the signature of a signer. For example, the device used in a retail store on which you sign for a purchase using an electronic pen connected to the device
- LocalSign - AssureSign's desktop app that interfaces with external signature device (signature pad) desktop
- Bulk Send - Allows users to effortlessly send the same document(s) to multiple contacts by uploading email addresses with a .CSV file.
- Immediate Presentment - the concept of presenting documents for signatures inline within an existing business flow. For example, online sales in which a signing session is automatically initiated following order entry or pre-qualification and an email invitation to sign need not be sent to the signer
- SendToAssureSign - Windows application that allows you to print files for upload to AssureSign
- Trigger App - a lightweight companion app for the AssureSign service and uses defined document templates available to a validated AssureSign user to be listed, generated and signed on a mobile device or sent via email.
- DocumentNOW - a bundle of services made available as web service methods utilizing SOAP and or http POST operations
- DocumentTRAK - configured communications (also known as Web Hooks) that are triggered by certain events in the document workflow.
- Digital Signature - different from an electronic signature, this method of signing documents electronically which requires a secure, individual, digital certificate provided by a certificate authority to the individual signer.

While not an exhaustive list of definitions, the above list is a good primer for any new eSignature user. All of these definitions, as well as every other resource you might need to implement and integrate AssureSign eSignatures into your organization can be found in our knowledge base.