Adobe Acrobat Sign — **Adobe** ✕ **Microsoft**

Better together: Adobe Acrobat Sign and Microsoft

Keep financial services moving with secure document interactions.

In today's hypercompetitive and rapidly changing world of financial services, you're working to enable bankers and advisors to exceed client expectations. You need solutions that fit into your existing workflow processes and help your employees be more efficient and productive.

With Adobe Acrobat Sign integrated directly within Microsoft applications, you can provide your teams with powerful, easy-to-use capabilities:

- Review documents with clients in "face-to-face" meetings and have them signed live with Acrobat Sign for Microsoft Teams.

- Generate agreements, forms, and policies automatically with Microsoft Power Automate, Collaborate, SharePoint, Acrobat Sign, and Adobe Document Services.

- Enable digital onboarding with Microsoft Power Apps, SharePoint, Dynamics 365, and Acrobat Sign.

- Enhance collaboration with integrated workflows in the tools employees use every day across the Microsoft portfolio.

Adobe Acrobat Sign and Microsoft applications work together across the entire customer lifecycle, from prospecting and onboarding to service.

Prospecting and onboarding	Sales	Service
Financial services and banking	**Financial services and banking**	**Financial services and banking**
• Client onboarding • Registered investment advisor onboarding • Employee onboarding	• Banker productivity • Document lifecycle • Commercial loan origination • Mortgage origination	• Cash withdrawal • Power of attorney • Next-best-action decision-making • Product onboarding

Financial services use case examples

Improve banker and advisor productivity.

To provide personalized sales support and service, banks and financial services companies are focusing on human-digital hybrid models. Shortening time-to-money results in an increase in prospect-to-customer conversion rates and customer satisfaction.

With Adobe Acrobat Sign and Microsoft Teams, you can provide live interactive video experiences to support advisor/client interactions including identity verification, closing, and signing. Convert labor intensive, routine processes into automatic workflows with Microsoft Power Automate. Decrease banker and advisor time spent on lower value activities like filing documents, filling out forms, and mailing hard copies for signature.

Deliver faster client and employee onboarding.

Financial services companies and banks are looking for a solution that can deliver all-digital experiences for new client and employee onboarding while increasing internal efficiencies, integrating with existing infrastructure, and extending the ROI of systems they already use.

With Acrobat Sign and Microsoft SharePoint, you can process applications faster with fewer errors thanks to error mitigation at data entry. Acrobat Sign helps ensure secure application and account servicing processes in compliance with global regulations.

Provide quick and easy new agreement processes.

Any banking product—from mortgage applications to preapprovals on car loans—requires filling out forms, submitting documents, and getting signatures. Banks are looking for a solution that can deliver all-digital experiences for lending and nonlending applications, as well as account servicing and maintenance.

With Acrobat Sign and Microsoft Dynamics 365, you can deliver complete digital application and sign-up processes that are quick and easy—plus minimize returns due to data entry errors. Work from the Microsoft applications you're already using for seamless access to e-signature and digital document capabilities. Eliminate costs related to printing, paper, postage, scanning, and storage.

Enable cross-team collaboration.

Streamline reviews and sign-offs from colleagues and clients. Increase employee productivity through enhanced communication and collaboration. Share assets and e-signatures from Microsoft Teams for instant access and efficient collaboration. Gain more agility and speed in cross-team collaboration and drive decision-making. Create, send, and archive documents with industry-leading security and compliance standards.

Customer success stories

TSB Bank

Use case:
Client and digital onboarding

Year founded: 1810

Employees: 7,000

140,000 forms processed in three months replaced 15,000 branch visits

21 digital self-service forms launched within months

9% increase in self-service rate

NatWest Group

Use case:
Digital onboarding

Year founded: 1968

Employees: 60,000

9 million sheets of paper, 960,000 gallons of water, and 336,000 pounds of wood saved with paperless workflows

520% increase on year-over-year adoption supporting 1.3 million annual e-signature transactions

90% reduction in average contract cycle time for 2 million contracts

Skipton Building Society

Use case:
Mortgage origination

Year founded: 1853

Employees: 1,800

97% reduction in average time to sign a new lending agreement

750 resource hours saved by reducing time spent checking paperwork for errors

6,000+ lifetime individual savings account (ISA) agreements processed with no missed cut-off dates

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, Microsoft 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 and Microsoft partnership page. Or learn more about Adobe Document Cloud for financial services.