



Brand building through memorable events.

Leading Authorities streamlines client contract signing process with Adobe Sign integrated with Microsoft Dynamics 365.

LAI Leading Authorities, Inc.
Speakers | Video Communications | Live Events

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Brie Merhar, Senior Director, Digital Marketing and Data Analytics, Leading Authorities

SOLUTION

Adobe Sign, an Adobe Document Cloud solution

Microsoft Dynamics 365

RESULTS



REDUCES contract completion time from months to hours



Improves the onboarding **EXPERIENCE** for new clients

20% **DECREASE** in administrative work through automation



Frees employees to **ADD VALUE** to the business by strengthening service offerings



Leading Authorities, Inc.

Founded: 1990

Employees: 86

Services: Speakers' bureau, video communication agency, event management

Washington, D.C.

www.leadingauthorities.com

www.laivideo.com

www.lailiveevents.com

CHALLENGES

- Integrate a contract e-signature capability within Microsoft Dynamics 365
- Create a professional first impression for new clients
- Eliminate legacy contractual complexity through automated e-signature workflows
- Free sales and marketing staff from administration to help build the business

USE CASES

- Digital Workflows
- Administration and Control



Creating events to remember

Clients rely on Leading Authorities, Inc. (LAI) to support their events and marketing with speakers, video production services, and live event production. They engage LAI Speakers to source high-profile speakers such as CEOs, athletes, authors, and celebrities for their keynotes; and LAI Video to produce original, creative video content to captivate their audiences. In addition, these busy, time-pressured professionals will often outsource the entire management of their events, from specialist conferences to large-scale trade shows, to LAI Live.

With expectations so high, the pressure is on Leading Authorities to deliver. However, the sheer diversity and fast-paced nature of Leading Authorities' business means that the associated levels of administration could often become a burden—and sometimes encroach on the polished levels of service its clients expected.

For example, at any given time, the company is signing hundreds of contracts with clients, event speakers, and third-party suppliers—with significant manual effort going into the creation and management of each document.

"Our employees were constantly printing, scanning, and faxing contracts to keep up with tight client timescales," explains Brie Merhar, Senior Director, Digital Marketing and Data Analytics, Leading Authorities. "Given the volume of contracts we produce, and the multiple steps involved in generating, following-up, and getting them signed, they'd become a significant drain on our resources."

“The Adobe Sign and Microsoft Dynamics 365 integration accommodates the variety and complexity of our different contract formats while offering clients a world-class signing experience befitting our brand.”

Brie Merhar, Senior Director, Digital Marketing and Data Analytics, Leading Authorities

Signing contracts was an equally cumbersome experience for Leading Authorities' clients and event speakers. These on-the-go professionals had to find a place to print out, sign, scan, and either email or fax a contract back to the company. The multiple steps often resulted in delays in getting contracts signed, requiring persistent follow-up from Leading Authorities' sales team.

Reigning in processes with e-signature workflows

Leading Authorities wanted to create a professional first impression with clients by streamlining the contract signing process. For the company, signed contracts aren't just the culmination of many hours of business development effort. They mark the beginning of important new client relationships.

To create a better experience, the company began evaluating e-signature providers. A key requirement was that the solution integrate seamlessly with Microsoft Dynamics 365, the CRM platform used by Leading Authorities' sales, marketing, and accounting teams. Adobe Sign, an Adobe Document Cloud solution, met that and other critical needs.

“Adobe Sign is easy to customize and offers powerful capabilities,” explains Merhar. “In addition, Adobe Sign integration with Microsoft Dynamics 365 allows our sales organization to create contracts within Dynamics 365, without leaving their desks. The ability to keep our customer information in one place also increases productivity.”

Other factors in selecting Adobe Sign were its blind copy capability, which keeps the sales support team apprised of contract status; as well as its field merge feature, which allows contracts to be embedded within signature fields, saving 20% in administrative work and time.

Adobe Sign speeds contract completion

The deployment of Adobe Sign enabled Leading Authorities to automate its contractual process for the first time, and today, the company is processing more than 3,200 contracts per year using the solution.

“Whereas it previously could take weeks for us to receive a signed contract, we now get them back within days, and even hours,” notes Merhar. “The e-signature capability makes it easier for our clients, particularly when they're on the road. Now, they can simply sign using their mobile device, from wherever they are.”

In addition to being able to deliver contracts faster, the Adobe Sign and Microsoft Dynamics 365 integration enables the status of all contracts to be tracked from one central location—a critical capability given the high volume of events Leading Authorities supports.

“Through our implementation success, Adobe and Microsoft have not only become partners in helping us achieve our integration objectives, but also in realizing our wider business ambitions.”

Brie Merhar, Senior Director, Digital Marketing and Data Analytics, Leading Authorities

SOLUTION AT A GLANCE

Adobe Document Cloud

Adobe Sign

Microsoft Dynamics 365

The integration efficiencies and Adobe Sign automated workflows have also freed Leading Authorities' employees from longstanding contract-related administration, enabling them to spend more time building client relationships, sourcing talent for the speakers' bureau, or refining the company's service offerings. Merhar says: “Our employees can now fully apply their talents to building the business.”

Accommodating different contract formats

Today, Leading Authorities' speakers' bureau contracts are created in Microsoft Word, and—uniquely for this part of the business—are sent simultaneously to the commissioning client and their chosen event speaker via the Microsoft Dynamics 365 and Adobe Sign workflow. Once both contracts are signed and returned, the company can progress to next steps, such as arranging speaker travel and logistics.

Meanwhile, within the video agency and event production businesses, contracts tend to be longer and more customized, embedded with creative concepts and graphic designs. They are typically created in Canva, converted to PDF, and then sent via the Microsoft Dynamics 365 and Adobe Sign workflow to clients for signing.

“The Adobe Sign and Microsoft Dynamics 365 integration accommodates the variety and complexity of our different contract formats while offering clients a world-class signing experience befitting our brand,” says Merhar.

Creating further efficiencies through integration

Leading Authorities is currently considering how to achieve deeper integration with Microsoft Dynamics 365 for more efficiencies. For example, it would like to populate fields in the CRM with information to enable the sales team to better accommodate customers' needs.

Merhar concludes: “Through our implementation success, Adobe and Microsoft have not only become partners in helping us achieve our integration objectives, but also in realizing our broader business goals.”

For more information

<http://acrobat.adobe.com/us/en/sign.html>



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