Connecting businesses through unified communications.

PGi deploys Adobe Sign integrated with Salesforce to deliver products and services to customers faster.

PGi

"Adobe Sign workflows and notifications not only save employees across the company a lot of time, but they also enable us to deliver products and services to customers faster and more efficiently."

Cody Royster, Director of IT, CRM Operations & Technology, PGi

SOLUTION

Adobe Sign, an Adobe Document Cloud solution

Salesforce

RESULTS

COMPLETES contracts in 33 hours, versus several weeks, including the capture of e-signatures across geographies

Offers customers and employees **FAST AND EFFICIENT** experiences with contracts

Data visibility, automated enterprise-wide workflows, and notifications **INCREASE** internal **EFFICIENCIES**

Helps **PROTECT** the **CONFIDENTIALITY** of HR-related documents

PGi

Founded in 1991

Atlanta, Georgia

www.pgi.com

CHALLENGES

- Provide global company teams with a 360-degree view of customers and related documents and contracts to accelerate the company's evolution into a unified communications provider
- Unite disparate global operations and recent acquisitions through a common enterprise business strategy
- Achieve a consistent, automated e-signature approach across the enterprise
- Increase productivity through automated workflows

USE CASES

- Digital Workflows
- Administration and Control
- HR Efficiency

Evolving into a business communications company

PGi is transforming from a conferencing company into a business communications provider, allowing businesses to more easily connect, collaborate, and conduct business worldwide.

To gain a better view of its customers' business requirements, the company consolidated its siloed, global CRM systems onto Salesforce. The move empowers teams to support customer retention by offering an unprecedented, 360-degree view of customers, including insights on growth drivers, products they currently subscribe to, additional solutions that might add value, and satisfaction levels.

"Our evolution into unified communications required us to re-evaluate our approach to business," explains Cody Royster, Director of IT, CRM Operations & Technology, PGi. "During our planning, it became clear that an enterprise-wide contract management solution would reflect our market ambitions both externally and internally, give us better insight into the state of the business, and make a huge difference to productivity."

Setting sights on consistent approach to contracts

Initially, PGi used DocuSign e-signature capability for contracts within Europe, the Middle East, and Africa, and periodically in North America when required by specific channel partners. "Our use of DocuSign was localized, and our contracts weren't joined up globally," says Royster. "Overall, the process was disjointed."

In regions or situations where DocuSign was not used, PGi employed a legacy, on-premises contract management system, through which documents were generated in Microsoft Word, and then emailed to customers for signing. Upon receipt, a customer would print out, sign, scan, and email the document back to PGi representatives, who would counter-sign and repeat the steps. Final contracts were manually uploaded to Salesforce for the order to be fulfilled.

"It was a time-consuming process, and we needed a single, automated contract management solution across the company that could handle workflow, signature capture, and storage," says Royster. "The solution also had to integrate with Salesforce—a critical business tool for our teams."

Adobe Sign: the de-facto e-signature solution

Following a review of different e-signature solutions, PGi selected Adobe Sign, an Adobe Document Cloud solution. Adobe Sign was chosen because of its enterprise-wide capabilities; seamless integration with both Salesforce and PGi's newly built configure, price, and quote (CPQ) system; simple, intuitive set-up and configuration features; and competitive price.

"Adobe Sign and Salesforce integration enables analytics that show us gaps in the process and how we can address them by improving our workflows."

Cody Royster, Director of IT, CRM Operations & Technology, PGi

"Our CRM team felt immediately comfortable with Adobe Sign because it functioned as a seamless extension of Salesforce," says Royster. "Their validation was important, because they were the ones who would have to install, maintain, roll out, and train the global organization on it."

New analytical capabilities drive efficient workflows

The Adobe Sign integration with Salesforce has given PGi visibility for the first time into the full process for completing contracts. For instance, the CRM team can track how long a contract spends in draft mode, the average time spent with a customer or internal signer, and overall completion time.

"Adobe Sign and Salesforce integration enables analytics that show us gaps in the process and how we can address them by improving our workflows," says Royster.

Contracts are initially created in PGi's CPQ system in the format a person needs, such as PDF, Word, or Excel. Once a contract is signed, finalized, and stored in the system, it is auto-closed within the master pipeline workflow, and notifications are sent to the appropriate sales representatives.

At the same time, the new company setup process is triggered, prompting the implementation team to facilitate next steps with the customer and fulfill the order. Finally, notifications enable the finance team to set up the customer account in the billing system and calculate any commission owed to the sales team.

"Adobe Sign workflows and notifications not only save employees across the company a lot of time, but they also enable us to deliver products and services to customers faster and more efficiently," says Royster.

Supporting GDPR compliance and sales and HR documents

In addition to facilitating new contracts, Adobe Sign is used to approve amendments to existing contracts, and to obtain European customers' consent to the European Union's General Data Protection Regulation (GDPR), which helps ensure data protection and privacy. The solution is also used to sign sales commission packs for new personnel, plus amended commission terms for existing personnel. This gives the company's sales representatives a clear understanding of how their performance is measured and rewarded.

At the same time, PGi's HR department uses Adobe Sign for employee-related legal documents and severance packages. The HR team found it easy to set up user groups and management settings in the Adobe portal—expediting the use of the solution—and felt reassured by the configurable security settings.

"Our CRM team felt immediately comfortable with Adobe Sign because it functioned as a seamless extension of Salesforce."

Cody Royster, Director of IT, CRM Operations & Technology, PGi

SOLUTION AT A GLANCE

Adobe Document Cloud

  Adobe Sign

Salesforce

For more information
http://acrobat.adobe.com/us/en/sign.html

Adobe
345 Park Avenue
San Jose, CA 95110-2704
USA
www.adobe.com

Uniting the global business

Globally, Adobe Sign is now used to sign 135 company contracts per month, 90% of which are sales related. Due to the solution's efficient and consistent e-signature capability, most contracts are completed in just 33 hours, including the capture of e-signatures in different geographies which previously could take weeks.

With the integration of Adobe Sign with Salesforce, PGi can better unify its rapidly growing operations worldwide and gain an accurate, integrated view of customers to accelerate the company's success.

"Our recent acquisitions currently use their own sales and contracting processes," explains Royster. "We'll be using the same successful approach that united our own organization and adopting Adobe Sign integrated with Salesforce at recently acquired companies to drive consistency and a customer-first focus."