



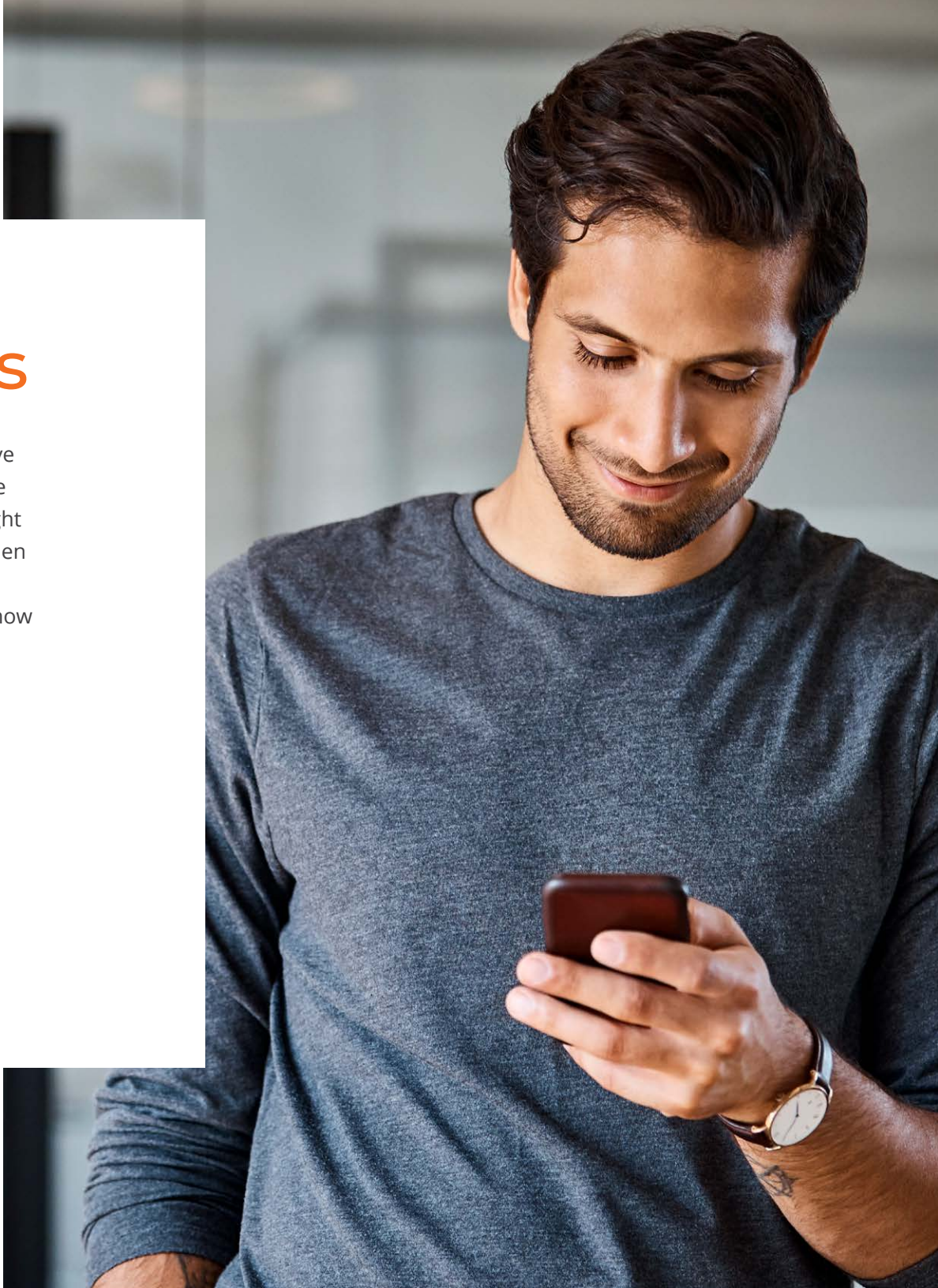
Choosing and implementing the right eSignature provider

A step-by-step guide for implementing eSignature

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This eBook offers helpful tips to decision makers who have been tasked with finding and implementing an eSignature solution that is the right fit for your business. We'll highlight what you need to know to make an informed decision when selecting an eSignature provider; help you prepare for a smooth, successful implementation; and share ideas on how to enjoy long-term success with your new digital solution.

- X WHAT TO LOOK FOR IN AN ESIGNATURE PROVIDER
- X STEPS FOR PLANNING AND CONDUCTING YOUR IMPLEMENTATION
- X HELPFUL TIPS FOR MAKING ESIGNATURE A SUCCESS



What to look for in an eSignature provider

Adopting and implementing eSignature to increase the efficiency and profitability of your business is a great step, but not one to be taken lightly. Implementing electronic signature is very much like implementing a new CRM: all your business processes will undergo change.

So, before you begin the implementation process, one of your first steps is choosing an electronic signature software provider that fits your business, your organizational culture, your existing technology, and your budget.

4 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 electronic signature software.

CLOUD: Many 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 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 and/or industry?

To understand what features you need from eSignature software, you need a detailed understanding of your actual business processes that require 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 needs?

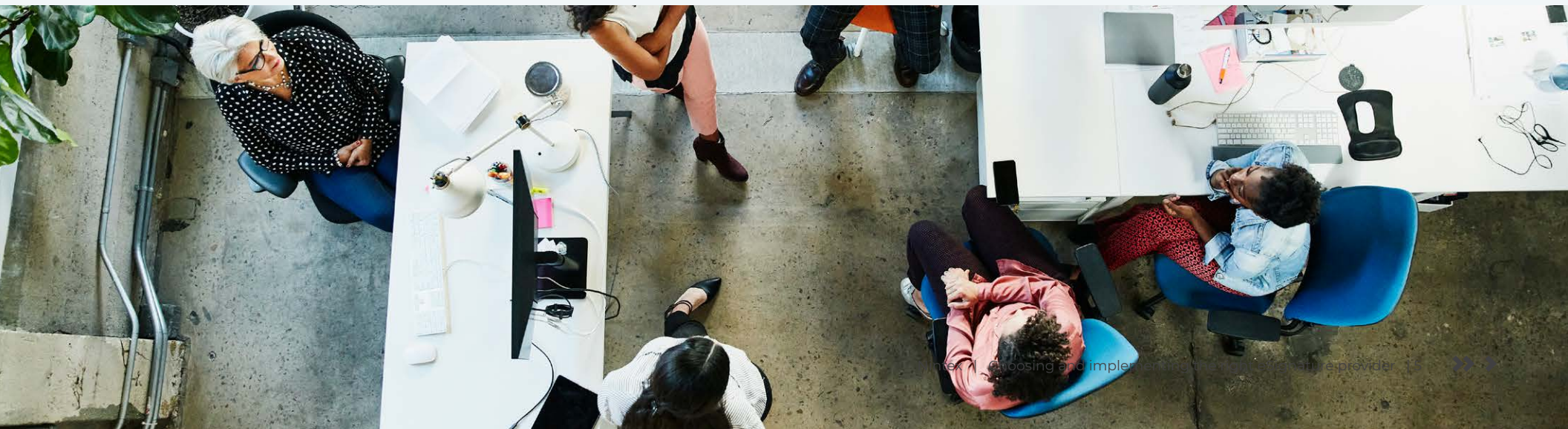
Every business is different. Your business may have few internal users but thousands of eSignatures (transactions) per year, or you may have hundreds or thousands of users but just a few monthly transactions per user.

Choosing the wrong type of pricing model can end up costing you far more than you should pay. Ask potential providers for a 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 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 outcome will be painful.

These questions should help you reduce your choices of eSignature providers down to a shortlist. Then, it’s time to get specific with each vendor and put your finalists to the test.



What differentiates eSignature software?

There are two major points of differentiation among the many eSignature software products:

1. How the software integrates with your current systems and processes. 2. Where to deploy.

1. Integration with business systems

Your organization has chosen which business systems to use in your day-to-day operations:

CRM E.g., Salesforce, Microsoft Dynamics

ERP E.g., SAP, Oracle

Productivity Software E.g., Microsoft Office, Google Suite

Are you willing to change one, or many, or all of them to implement a new business process? Probably not. Therefore, it is 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 eSignature software finalists into your organization and play open cards. Both parties should sign a non-disclosure agreement for their own protection. Then there should be an open and frank discussion about their software's compatibility with the tools your organization uses in its regular operations.

For each tool or system, you should ask these three questions:

1. *Is your software natively compatible?*
2. *Is there an API?*
3. *How many times have you integrated with this tool (and how successful was the integration)?*

If the provider cannot answer yes to these questions (and certainly no. 3), it may be cause for concern. This may not necessarily signify the end of your negotiations, but it should be noted that this particular vendor might be weak in that area.

2. Where to deploy: in the cloud vs. on-premise

eSignature is often thought of exclusively as a cloud-based service. When the ESIGN Act passed back in 2000, SaaS-based electronic signature providers entered the market because they are quick and cost effective for small and mid-sized companies. However, SaaS-only solutions were and still are unworkable for some enterprises, in particular those in regulated industries, and certain government agencies.



A CASE FOR ON-PREMISE

For some larger enterprises, the risks of the cloud can 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, greenscreen 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 to certain protocols to stay in compliance, and value security more than anything else. These organizations may opt for an on-premises solution.

HYBRID SOLUTION

For highly regulated industries and enterprises looking to the cloud, but who cannot move their IT infrastructures immediately due to security and infrastructure concerns, the hybrid option may be best.

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

Hybrid cloud is a mix of on-premises data center and cloud-hosted apps and data. Hybrid cloud deployments offer the best of both cloud and on-premises, 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 premises. For these reasons, hybrid electronic signature deployments are preferable for many enterprises and government entities, providing for the desired control and security while harnessing the mobility and flexibility offered through the cloud.



3. Deploy as you like

Nintex AssureSign is an electronic signature solution that is compatible with the needs of large enterprises and regulated organizations. Our approach to deployment is “deploy as you like” because 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. This is 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-premises, or a hybrid model, Nintex AssureSign can do all three.



4. Understand the user experience

A critical step in evaluating an eSignature vendor is to arrange a full demo of their product, so you can experience and learn about both the end-user platform as well as the admin interface. This is key as there are two usability components to any eSignature platform:

THE END USER INTERFACE

Where your customers will sign documents.

THE ADMINISTRATIVE INTERFACE

Where your internal employees will accept signatures and organize signed and unsigned documents.



Additional factors to consider

There are several areas to assess when comparing eSignature vendors ranging from security to pricing to support.

SECURITY

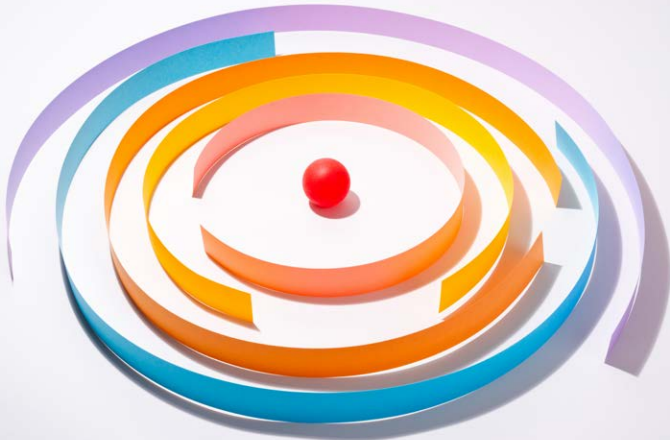
How will your documents be stored and protected? That question should result in a clear and solid answer. If your potential provider squirms at that question, it's time to move on. The question of security can also lead to questions about legality: Has the document been changed? Is this the same document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

PRICING RENEWALS

How will each provider handle your team's growth? It's quite common for an enterprise user to start small, gain adoption internally, and then add additional users once they get it set up and 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. 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 levels of customer support 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.



3

common methods of providing support are:

KNOWLEDGE BASE

Can you quickly look up answers to FAQs or access how-to guides?

WEBINARS

Are there consistent (weekly and monthly) webinars aimed at teaching administrators and end users common tasks?

ACCOUNT MANAGERS

Will you have a specific individual assigned to your account that you can call on anytime and, importantly, someone who will respond in a timely manner?

After going through all 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.

Plan 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. As with any implementation, 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 based on business needs and requirements. From small business to large enterprise implementations, no two are the same.



Starting your implementation journey

There are two steps, prior to beginning your actual implementation, which will help to smooth your business' transition from paper to eSignatures.

1

UNDERSTAND YOUR BUSINESS PROCESSES AND WORKFLOWS

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 local state government 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 eSignature.

[Nintex Promapp®](#) is a good option for organizations who want to map out and collaborate on processes.

2

CREATE A REALISTIC IMPLEMENTATION TIMELINE

It is common for a Fortune 100 organization to take a few months to fully implement eSignatures due to the complexity of their existing systems, software, and processes. However, smaller companies can likely implement it in days or weeks.

Organizations making the transition should lay out reasonable, realistic goals for implementation by creating a timeline for each step:

Discovery and research to find your top 2-3 providers

Testing and integration to find the best fit for your needs

Training for your implementation team and additional employees

Launch date to go live

Identify champions for your implementation team

There are three key types of team members required for implementing eSignatures and facilitating exciting change within your organization. Depending on the size of your company, that may mean three different people, one person wearing multiple hats, or it could mean three groups of people.

Within each of these groups, you 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. 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 answer early adoption questions. This person will need to have a very open channel and solid relationship with your eSignature provider, so they should be involved early in the vendor decision process.

TECHNICAL & IT RESOURCE(S)

If you’re planning to integrate the selected eSignature provider with your current back-office software, such as your CRM, this member has 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 business-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.

END USER EVANGELIST(S)

Who will use your eSignature software every day for the foreseeable future? Regardless of how your organization is set up, you will have identified your end user evangelists. 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 internal and customer-facing representatives of your new eSignature technology.



Technical implementation readiness

Generally speaking, a technical resource is either a software developer, IT pro, or a systems administrator. How well your technical resource can 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 get up to speed on implementing this new software. Below are the Nintex 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

Like a “developer account”, a development sandbox gives the developer the resources to create and test the various connections that your organization requires to fully implement eSignature.

KNOWLEDGE BASE

A knowledge base that 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 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 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.

A photograph of two men in an office setting. The man on the left is wearing glasses and a denim shirt, holding a coffee cup. The man on the right is wearing a grey sweater and holding a tablet. Both are smiling and looking at the tablet. The image has a blue overlay.

Implementation best practices

There are a couple of best practices that are extremely helpful for companies implementing eSignature technology.

1. 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.

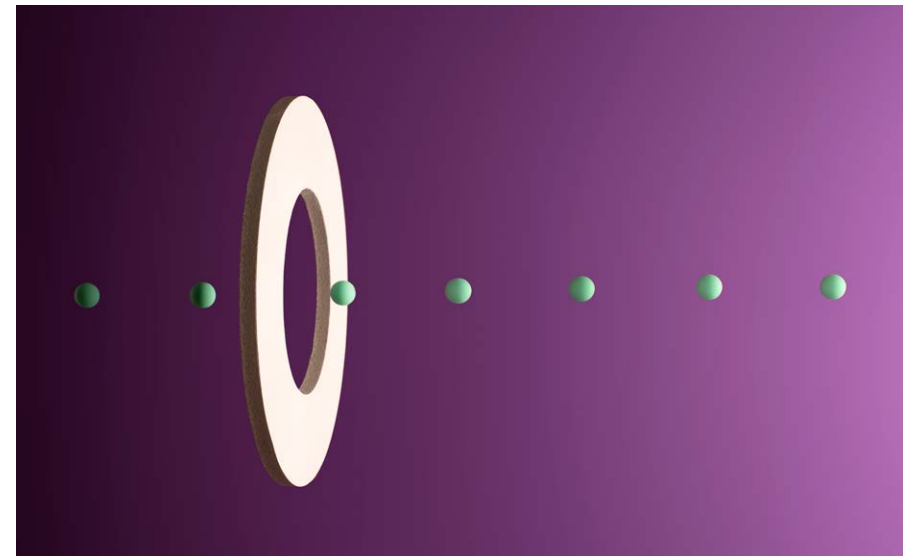
REMINDER

By this stage you should already have 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.

2. 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, with Nintex 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 at no cost.



Internal user adoption

An important question is **“How will your employees embrace change?”** which is why we’ve supplied three helpful tips to ensure a smooth transition within your organization.



MAKE IT POLICY


Communicate the decision as new company policy, which may look different for every organization as each business 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, why, what, where, and when of the change. Make it policy in a way that suits your organization, but be clear that this is where you’ve decided to go.

REWARD

Recognize your early adopters and evangelists 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 eSignature.

SET DEADLINES

Obviously, you can’t just switch from blue ink to eSignature overnight, so decide on a date in the future on which every new process will be 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.

We believe organizations today have no time to lose but everything to gain when it comes to adopting transforming technologies. With Nintex, organizations can gain all the benefits of eSignature technology without delay. With the power and ease of the Nintex Process Platform you can combine eSignatures with process automation, document generation, and other powerful technologies, to digitize and transform processes across your business.

ABOUT NINTEX

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

