

✦ EVERYTHING YOU NEED TO KNOW ABOUT ✦

Getting Your Sales Team Set-Up with eSignatures



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I. Introduction



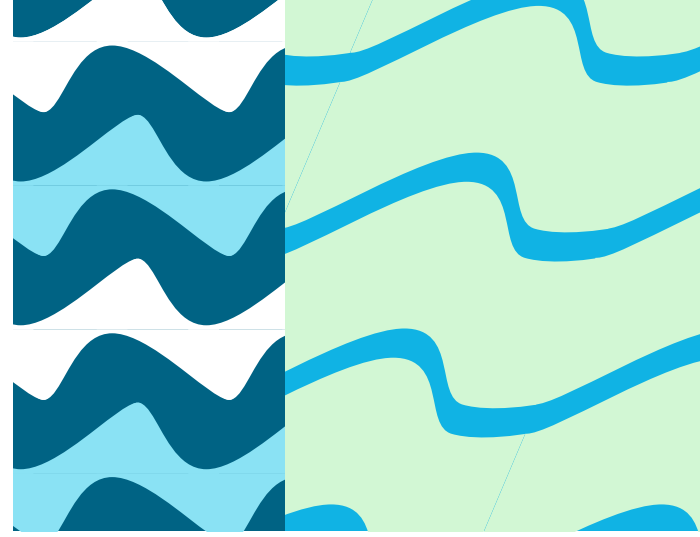
Leading sales teams focus on closing deals, not dealing with fluff. But [Salesforce reports](#) that the average rep still spends only 34% of their time selling and nearly 10% focused on admin tasks.

When revenue is the end-game, it's *critical* for companies to remove unnecessary roadblocks from their Sales team's path so they can do more of what they do best—sell! One immediate and lasting way to do this is by optimizing and streamlining repetitive, but required sales documents like contracts, NDAs, and quotes.

[HelloSign](#) has several options for easily creating, completing, and storing these documents—and all with industry-leading security, legality, and compliance features. This resource gives you an overview of your options, and helps guide you towards the best fit for your team.

Whether you're a global enterprise corporation or a scaling sales function, you'll see opportunities for getting your most important sales documents sent and signed with minimal effort.

II. Deployment Options for eSignatures in Sales



Depending on how your sales team is structured, you have several options for deploying an eSignature solution to improve efficiency in your Sales function.

Any of the solutions listed below will help you to meet your team—and your contracts—where they're at, whether via an integration, an app, or an API.

HelloSign Integrations with Existing Sales Systems

HELLOSIGN For Salesforce

HelloSign can easily be integrated into Salesforce, one of the world's top rated sales CRMs. [The integration is extremely simple to set-up](#) within Salesforce and allows users to prepare and send sales contracts, waivers, or other documents for signature to customers without having to leave the CRM.

HELLOSIGN For Salesforce CPQ

Salesforce Sales Cloud customers who are also using Salesforce CPQ (formerly known as Steelbrick) can send their quotes out for signature with our [HelloSign for Salesforce CPQ](#) extension package.

HELLOSIGN For Oracle CPQ

[HelloSign also integrates with Oracle CPQ](#). With this integration, you're able to send out quotes for signature directly from Oracle CPQ.

HELLOSIGN For HubSpot CRM

[HelloSign integrates into HubSpot CRM](#), the free CRM for small businesses. You'll be able to see when your contact receives, opens, viewed, or signed a document, and it'll be added directly onto that contact's timeline.

HelloSign as a Standalone eSignature App

[The HelloSign web app](#) is perfect for those who don't want or need to integrate eSignatures into a CRM or in-house system. HelloSign gives you all the power of an eSignature solution in a simple, intuitive web application. HelloSign allows your team create re-usable templates for commonly used documents like quotes, order forms or proposals and send those out to customers in minutes.

HelloSign API as a Best-in-Class eSignature API

[The HelloSign API](#) is our best-in-class eSignature API designed to integrate into whatever tools or website your team currently uses. It's perfect for teams who want to integrate eSignatures into their website or service, or those that want signers to get a fully white-labeled experience. Whether to an internal system or another 3rd party system, HelloWorks API is best for a complex or multi-system sales use case.

HelloWorks as a Solution for Mobile-First Signing Workflows

[HelloWorks](#) helps sales teams turn sales contracts into fast-to-complete, mobile-first workflows. HelloWorks contracts are designed to be completed on mobile, include advanced data validation, and can generate agreements by populating data from external systems. Finally, data is no longer tied to a PDF which means it's free to be sent to your back-end systems without manual intervention.

HelloSign for Cloud & CMS

HelloSign also integrates with the Cloud and Content Management Systems you use most, like Dropbox, Google Drive, Box, and more.

[HelloSign for Dropbox Integration →](#)

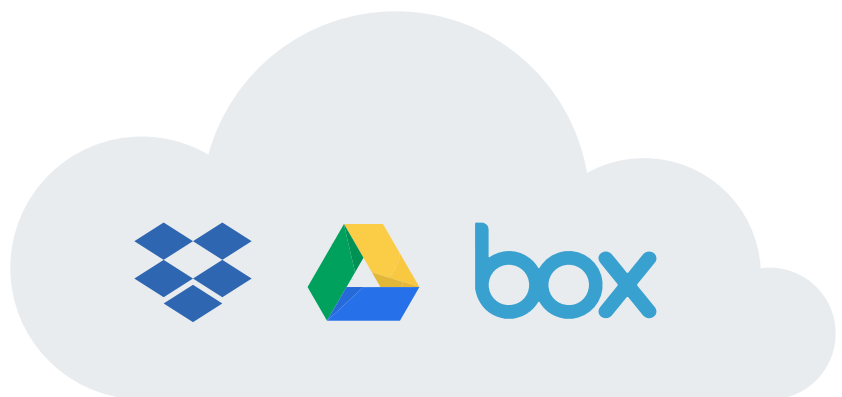
(which allows you to access Dropbox documents from HelloSign)

[HelloSign Dropbox Extension →](#)

(which launches a HelloSign signing flow from Dropbox)

[HelloSign for Google Drive Integration →](#)

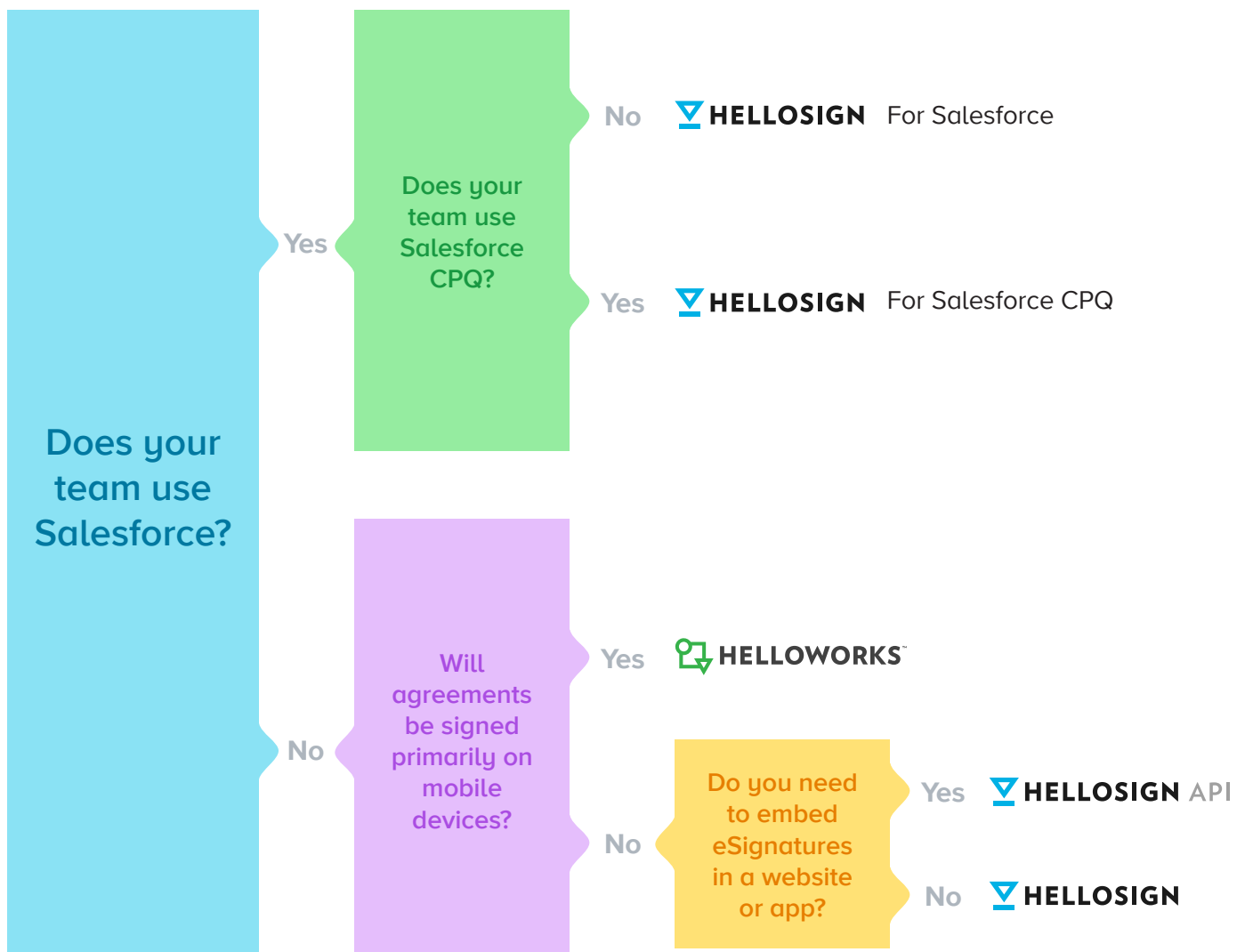
[HelloSign for Box Integration →](#)



III. Which Deployment Option is Best For Your Sales Team?

Now that you've seen the options – and there are a lot! – which one is best for you? The chart below will help guide you towards the right product fit for your sales team.

Product Flowchart



For the most part, readers will either immediately see themselves bucketed into a “Salesforce Enabled” path or a “Non-Salesforce Enabled” path. Either route provides great options for you and your teams.


For Salesforce-enabled teams.

For teams that leverage the power of Salesforce, the HelloSign for Salesforce add-on is a perfect fit. It allows your sales teams and admins to stay in Salesforce for template management and admin needs. HelloSign for Salesforce has an easy-to-use user interface that’s also passed onto your customers for a simplified signing experience. Better yet, it’s the fastest eSignature add-on to implement into your Salesforce instance. You can read more about the HelloSign for Salesforce integration in our supporting content piece, [“Everything You Need to Know About HelloSign for Salesforce”](#)

For non-Salesforce enabled teams.

HelloSign’s standalone web-based application, API, or cloud-based integrations provide lots of options for non-Salesforce enabled sales teams. Our webapp is a technology-agnostic solution that works for small teams and enterprise teams alike, and is an intuitive way to bring eSignatures to your sales team with minimal training and maximum adoption. Plus, with a host of integrations like Oracle CPQ, Google, OneDrive and Dropbox, we can connect to most best of breed tools. If you need to embed eSignatures into an application, website, or workflow you can easily do so with the HelloSign API.

Lastly, if you have mostly mobile-first signing flows then HelloWorks is a great option to consider. Because it turns signing workflows into mobile-first experiences, it makes mobile contracts extremely easy to fill out and sign.



Naturally, there will be unique factors that ultimately determine the best fit for a company. In addition to considering the pathways above, you may want to consider these questions as you make your selection:

- ✦ Do you want contracts to be sent out from your CRM, but don’t use Salesforce? (HelloSign for Hubspot CRM or HelloSign with Zapier may help you with this.)
- ✦ What volume of agreements will you be sending out, and who is sending these agreements?
- ✦ Do you have technical resources available if integration or custom coding is required?
- ✦ What’s your timeline for implementation and/or launch?
- ✦ What’s the budget for this project?

IV. Competitive Comparisons for eSignature Solutions



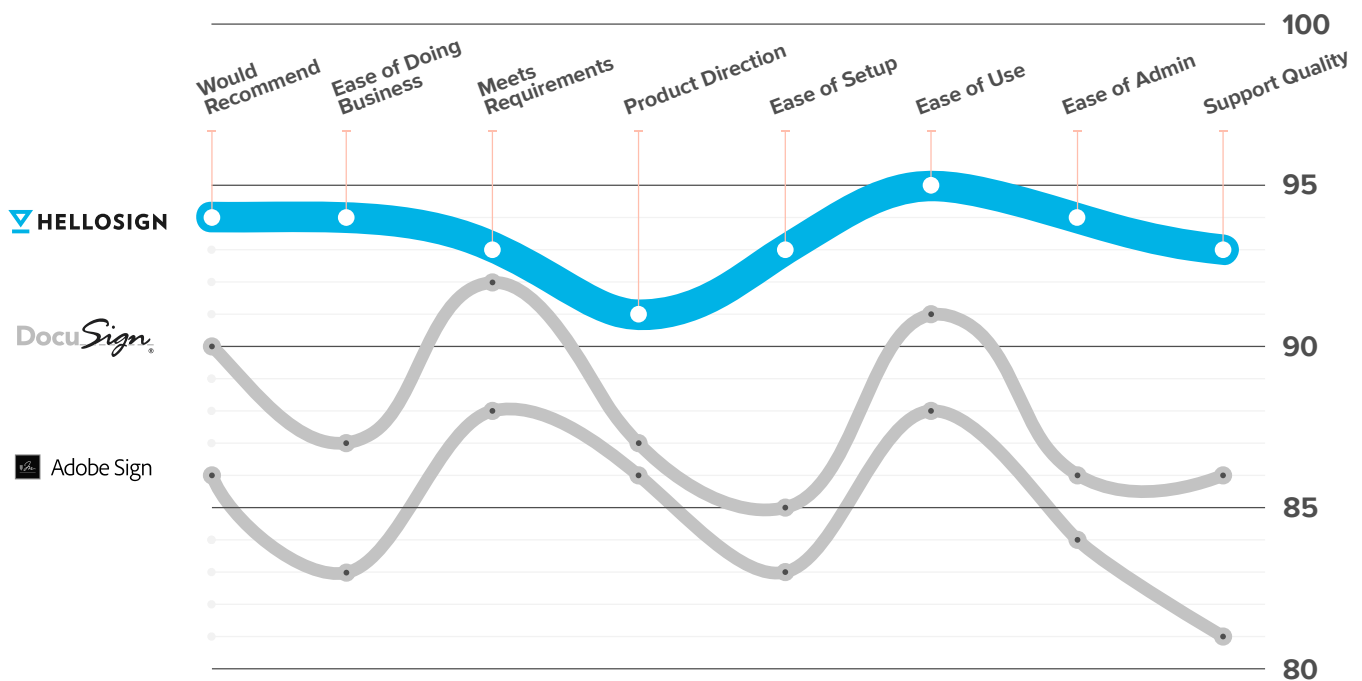
Along with understanding what product or solution seems like the right fit you, most customers want to see reviews from existing users, expert analysis, and successful customers. Across all categories, HelloSign outperforms both legacy competitors and new players.

G2 Crowd

G2 Crowd is the go-to place for B2B software reviews. It ranks competitors across over 30 metrics to determine who is best in class. Rankings are driven by objective reviews from software users and are done across metrics like ease of use, support quality, feature availability and implementation time.

↓ HelloSign implementation rankings

Source: G2 Crowd Reviews, HelloSign vs. DocuSign vs. AdobeSign

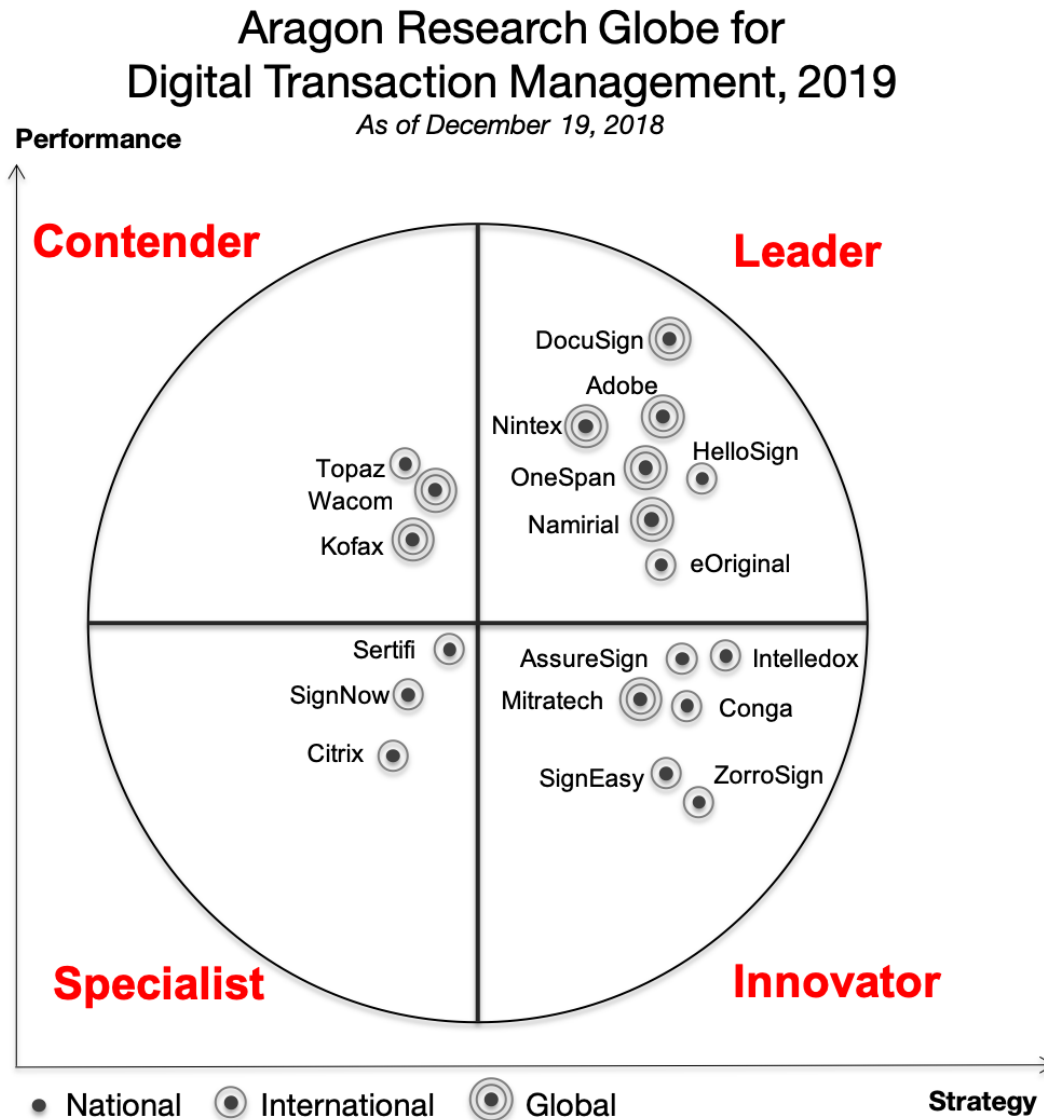


Aragon Research

Aragon is a pioneering research firm in the area of DTM (Digital Transaction Management), or eSignature solutions. Based on their research, they've ranked HelloSign as a leader in their Globe report for the last several years in a row.

↓ HelloSign as a Leader in the DTM space

Source: 2019 Aragon Globe for Digital Transaction Management



Customer Case Studies

And, of course, it's always helpful cross-check what results customers are experiencing before making a product or solution decision. HelloSign has many happy Sales teams using and benefiting from eSignatures.

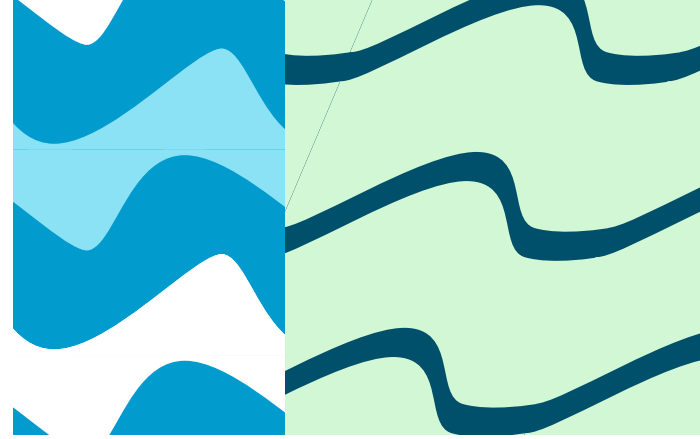
Vendini Uses the HelloSign Drive Integration to Close Deals on the Phone

Vendini, an entertainment company based in San Francisco, uses [HelloSign's Google Drive integration](#) to prepare their Master Service Agreements in Drive before effortlessly sending the formatted document to their clients. The clients are able to sign the documents with just a few clicks. Sales reps at every level use HelloSign to send out these documents, and consider HelloSign to be an essential component of their sales toolbox.

Read the full customer story [here](#).

“We started using HelloSign in the beginning of 2016 and have had great success closing deals more quickly – sometimes while the sales rep is still on the phone with the prospect.”

V. Vendor Assessment Checklist



We understand that all the bells and whistles in the world don't matter if a solution doesn't meet your core needs. Below you'll find some features and functionalities – both table stakes and beyond – that can be particularly helpful when using eSignatures in a Sales department. Use this list as a supporting guide as you make your assessments.

Assesment Checklist

- | | |
|---|---|
| <input type="checkbox"/> Team management, provisioning, and reporting | <input type="checkbox"/> Ability to track contract activity |
| <input type="checkbox"/> Contract templates | <input type="checkbox"/> Merge fields |
| <input type="checkbox"/> Customizable emails | <input type="checkbox"/> Data validation |
| <input type="checkbox"/> In-person signing | <input type="checkbox"/> Write back |
| <input type="checkbox"/> Mobile-signing | <input type="checkbox"/> Universal files |
| <input type="checkbox"/> Variable signers | <input type="checkbox"/> Proper compliances (SOC2, HIPAA, etc.) |
| <input type="checkbox"/> Signer reassignment | <input type="checkbox"/> Security (See Chapter VI) |

VI. Trust & Security at HelloSign



Last, but certainly not least, keeping data safe and secure is the highest priority at HelloSign, especially when customers are concerned. Here are some of the security measures we have in place for all documents, signatures, and users.

Bank-Level Security

Bank-level security is a vital element for eSignature software as it assures that the data gathered from audit trails and authentication is trustworthy.

At HelloSign, all communications are safeguarded by Secure Sockets Layer (SSL) encryption. Each document is stored behind a firewall and authenticated against the sender's session every time it's requested. Documents are also encrypted with a unique key—each of which is in turn encrypted with a regularly rotated master key. So even if someone were able to bypass our stringent physical security, they still wouldn't be able to decrypt your data.

Detailed Audit Trails

Audit trails ensure that every action on an electronic document is thoroughly tracked and time-stamped so you can tell if it was ever modified or tampered with without your knowledge. HelloSign creates a comprehensive, non-editable transaction trail between signing parties to make sure every eSignature has a court-admissible audit trail.

To provide you with transaction history, we track and timestamp various information—including IP and UserAgent info—from the moment the document is submitted for signature to when it is signed and completed. To help ensure that any tampering of your transaction log is detectable, we process each transaction with hashing technology. This provides a “copy” of every version of the document which you can use for comparison should a questionable version ever come to light.

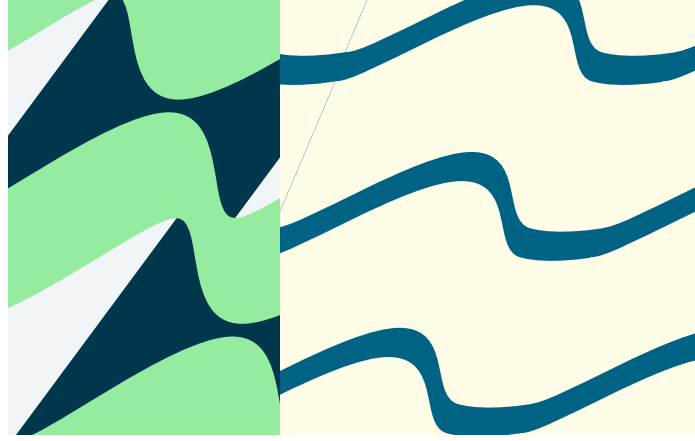
Thorough Authentication

To maximize security, it's important that your eSignature platform verifies that a user is who they say they are before they're allowed to execute a signature or even access a document.

When using HelloSign, any person signing a document must either have login information or have received a request for signature via email. To ensure no one is able to access a HelloSign user account without permission to sign or send documents fraudulently, all user information including usernames and passwords are 256-bit SSL encrypted. We also seek to prevent others from accessing or using your account by timing-out sessions and emailing you every time a contract is sent to, received by, or signed by your account.

In addition, we offer two-factor authentication and codes that signers must enter to view or sign a document. All of the authentication data that a user provides to HelloSign is encrypted and passwords are hashed and salted with an adaptive hashing algorithm.

VII. Other Resources



Everything You Need to
Know About HelloSign for
Salesforce

[Check it out →](#)

Everything You Need to
Know About HelloSign API

[Check it out →](#)

HelloSign for Salesforce
Admin Guide

[Check it out →](#)

HelloSign's API
Documentation

[Check it out →](#)

HelloSign's Trust Center

[Check it out →](#)

VIII. About HelloSign, a Dropbox Company



HelloSign’s digital workflow platform—which includes [eSignature](#), [digital workflow](#), and [electronic fax solutions](#)—empowers over 80,000 companies and millions of people do business faster every day. We help our customers close deals faster, onboard new hires with ease, complete documents without error, and much, much more.

[Sign-up for a free trial of a HelloSign Business Plan](#) today to see what HelloSign can do to accelerate your Sales function. Or reach out to our Sales team to learn more about setting up our HelloSign integrations with [Salesforce](#), Salesforce CPQ, [Oracle CPQ](#), and more.