



# TECHSHOW2018

## Creating A Digital Signature

WRITTEN BY:

Erin H. Gerstenzang and Kimberly Bennett

PRESENTERS:

Erin H. Gerstenzang: [@EHGLawfirm](#)

Kimberly Bennett: [@KBennettLaw](#)

March 9, 2018

## Table of Contents

Why use e-signatures?

Where to begin?

What are the different ways you could use e-signatures?

What is the difference between digital signatures and e-signatures?

Why would I want the API option?

Our picks for e-signature

Tools We Love (or like a lot!) #TWL



## *Why Use E-Signatures?*

E-signature tools bring ease and convenience to the first formal exchange you will have with your new client - signing your fee agreement.

Working with your law firm should be simple. There are few things as simple as signing documents with e-signatures. They make for a great client-experience and simplify the process for your law firm.

Think about the last time you had to print out a document, sign it, scan it and email it back to a business. Or worse, the last time you had to appear somewhere to sign paperwork - in person - in real life! These types of tasks seem onerous and outdated in 2018. Life is busier than ever. Clients do not want to interrupt a hectic day to sign paperwork.

Not only are e-signatures great for your client, but they are great for you too. E-signatures will help keep you organized and paperless. Your contracts will all be saved where they cannot be lost, and everyone automatically will receive a copy. E-signatures support a streamlined workflow that will make your onboarding process easy, predictable and incredibly efficient.

E-signatures will undoubtedly make your life easier, but the most important reason to embrace them is that your clients want you to.

## *But where to begin?*

First, you want to think about the best ways to use e-signatures in your business. Do you use an engagement letter or a fee agreement? Regardless of which type of document you use, you want to have a clear onboarding process that lets your client know when representation has officially begun and states what the client can expect while working with you.

'Design-thinking' is all the rage these days, and rightfully so. In 2018, consumers are savvier than ever, and with so many companies investing in designing great customer experiences, our clients are aware of the difference between a good one and a bad one. In this, and many other regards, law firms are no different than any other business and they cannot ignore the value of a good client-experience.

Take the time to intentionally design your engagement process so that working with your firm is simple from day one. Think about how you onboard your clients. What is the process? Is there a specific process every time or does it vary?

If it varies, then you want to look for opportunities to build a routine around client on-boarding. The way you handle the engagement process will set the tone for the new relationship. You want to convey that you are organized, detail-oriented and easy to work with.

If you already have a specific onboarding process that you follow, you should think about whether that process was designed with the client experience in mind. Many firms are using



the same process or similar process that was used when the business first opened. It would not be too hyperbolic to say that every law firm would benefit from an overhaul of the client onboarding process.

You may also want to think about incorporating e-signatures into other legal documents in addition to your fee agreement. When the client needs to sign a waiver or another contract, there are many opportunities to build-in simplicity and phone-friendly practices for you and your client.

Regardless of where e-signatures fit in your business before you select which type of e-signature tool you want to use, you should have a good idea of how you are going to use it.

### *What are the different ways you could use e-signatures?*

The most simple way to use them is for a document that requires only one person to sign. If your practice relies solely on these one-signature documents, there are many tools available that can do that, some of which you may already own.

But perhaps you want to do more with e-signatures. Perhaps you routinely have multiple signers. Or you want to use multiple templates. Better yet, maybe you want the document creation to be automated, so you will want a service that plays nicely with integration apps like Zapier.

Don't worry if that last part sounded complicated. It won't sound at all complicated after our workshop!

### *What is the difference between digital signatures and e-signatures?*

The terms 'digital signature' and 'e-signature' are often used interchangeably. However, they are not the same. E-signature refers to the entire class of virtual signatures, whereas a digital signature is a particular type of the more broad category of e-signatures.

E-signatures are just what they sound like. A way to represent your actual signature or agreement in an electronic form. For example, when you sign for a package from UPS - you are using a form of e-signature. Another example is when you are prompted to type your name into a signature box. Both of these are e-signatures.

Digital signatures are a bit fancier and more secure than other types of e-signatures. Digital signatures are fixed to the document and its content and relies on encryption to protect the document. In other words, if anyone were to change the document after it had been signed, the signature would also be affected, thus invalidating the signature. For these reasons, digital signatures are easier to rely upon in court, although both e-signatures and digital signatures are legally binding and enforceable.



### *Why would I want the API option?*

Having the API feature for e-signatures is important if you are hoping to use these types of signatures as part of an integrated and automated process. We will spend some time at the workshop talking about fun ways to automate your agreements, but for now, it is important to know that if you want your e-signature service to talk to other apps like Zapier or form tools, then you will want the API function.

The bad news is that normally the API subscription is a great deal more expensive than the regular or free plans. Make sure you plan to use all the benefits of the API feature if you decide to pay for it.

### *Our picks for e-signature*

If you're looking to minimize and, dare I say, eliminate the friction caused in onboarding your new clients or starting a new matter with an existing client, there are a plethora of e-signature tools available for you to choose to help streamline that process. While we have not reviewed every tool on the market, we wanted to highlight a few tools we love (#TWL) to help guide you through your e-signature tool selection process.

Remember, however, no tool is perfect for every person. The goal when integrating technology into your practice is to strike the right balance between functionality and usability for both the client and the practitioner.

### *Tools We Love (or like a lot!) #TWL*

#### TWL #1: Adobe Sign

This e-signature tool is easy to use, has key business app integrations and is Microsoft's preferred e-signature solution. If you are already in the Adobe ecosystem, are a Microsoft user or have simple documents to send for e-signature, Adobe Sign would be a great choice to power-up your client onboarding process. Check out Adobe's Youtube video on here for a quick demo.

#### TWL #2: HelloSign

This e-signature tool is perfect for the practitioner that has embraced e-signatures and is ready to take it to another level! With HelloSign, you can control the order of signatures, view the audit trail of a document you sent for signature, add team members with ease, create templates of your standard engagement/fee agreement and more! HelloSign's clean, user-friendly interface will supercharge your client intake process. If you're interested in viewing the e-signature process in HelloSign, [click here to view their quick demo](#).



Now, you ask, how did we get here? To become a #TWL, beyond the basic features we would expect for a solid e-signature tool, we wanted to see:

1. Ease of implementation & use (i.e. great user-experience and user interface)
2. A mobile app or mobile responsive e-signature capabilities;
3. Key integrations with other useful and efficiency focused tools;
4. An integration with Zapier;
5. An API option available; and
6. Reasonable pricing.

Now, we may love testing and implementing technology as it applies to the law, but we are not the only tech-lovers out there. For in-depth reviews on each platform, we have provided additional resources for you to read at your leisure. There's no need to reinvent the wheel when it comes to technology. If you are experiencing a particular pain point in your quest to create a frictionless process and you find a colleague, practitioner, or tech guru using a tool that works well and solves that same problem, TRY IT! As we have stated, there is no magic bullet. Remember, the key is to find a tool you will love that helps drive more business by creating a simple, user-friendly process for you AND your clients!

Great reviews to check out!

<https://www.capterra.com/digital-signature-software/>

<https://www.g2crowd.com/categories/e-signature>

<https://www.softwareadvice.com/electronic-signature/>

<https://accounting-software.financesonline.com/c/e-signature>

<http://www.techradar.com/news/best-e-signature-apps-software-solutions>



## E-Signature Quick Guide

Platform/Tool	Mobile App/Signing	Business App Integrations	Works w/Zapier	API	Cost (starting price)
<a href="#">Adobe Sign</a> (formerly EchoSign)	✓	✓	coming	✓	\$14.99/month, individual plan \$24.99/user/month, minimum 2 (team plan)
<a href="#">HelloSign</a>	✓	✓	✓	✓	\$0/month
<a href="#">DocuSign</a>	✓	✓	✓	✓	\$15/month, individual plan
<a href="#">eSignLive</a>	✓	✓		✓	\$33.50/user/month
<a href="#">RightSignature</a>	✓	✓ (Including Clio)	✓	✓	\$15/month, individual plan \$75/month, team plan (3 users)
<a href="#">Sertifi Closing Pro</a>	✓	✓	-	✓	€16/month, for up to 4 users
<a href="#">Signable</a>	✓	✓	✓	✓	£19/unlimited users/month
<a href="#">Signaturit</a>	✓	✓	✓	✓	€15/user/month, paid annually
<a href="#">SignNow</a>	✓	✓	✓	✓	\$7/user/month
<a href="#">Signority</a>	✓	-	Beta	✓	\$0, for individuals \$25, for teams w/API
<a href="#">SignRequest</a>	✓	✓	✓	✓	\$0, individual plan

