

Driving skills to increase competitiveness of British businesses.

Lifetime Training simplifies and expedites a compliant contract signing process with Adobe Sign integrated with Microsoft Dynamics 365.



"Our process with Adobe Sign is efficient, compliant, and creates a professional impression. The Adobe solution helps differentiate us and supports our position as an industry leader."

Piran Scott, Divisional Finance Director, Lifetime Training

SOLUTION

Adobe Sign, an Adobe Document Cloud solution
Microsoft Dynamics 365

RESULTS

 **FAST AND COMPLIANT** contract signature workflows

 Ability to prepare new contracts in just **30 SECONDS**

 **REDUCES** contract completion time by 80%

 **IMPROVES** contract accuracy to more than 95%



Lifetime Training

Established in 1995

Trains 25,000 learners annually

Conducts 800 courses per month

Bristol, England, United Kingdom

www.lifetimetraining.co.uk

CHALLENGES

- Achieve compliance with new Apprenticeship Levy regulation
- Deliver a strong first impression to learners through a modern, fast, and digital workflow
- Eliminate contract data entry errors and free staff to better support customers and drive sales

USE CASES

- Sales Acceleration
- Digital Workflows

Skills development key to Britain's future

Talent management is about much more than just attracting new talent. It's also about nurturing talent through training and skills development to build sustainable business success and prepare a business to respond quickly to future challenges and opportunities. Talent management is a particularly relevant topic in the United Kingdom, where low unemployment and the upcoming Brexit are making it harder for companies to fill positions with external candidates.

Bristol, England-based Lifetime Training is playing a significant role in this modern wave of talent management. For more than two decades, the company has delivered training and education programs that sharpen professional skills and support business growth. Today, it is one of the UK's leading training providers, delivering apprenticeship programs and training courses to 25,000 learners per year. A majority of the company's business involves the placement of government-funded apprenticeships in sectors such as health and fitness, leisure, social care, hospitality, and retail.

The increasing demand for UK apprenticeships that has contributed to Lifetime Training's success has brought with it some operational challenges. Growing its business has led to more learner and employer contracts completed every year. Creating the lengthy contracts for the company's commercial training courses was becoming increasingly time-intensive. At the same time, a new regulatory requirement led by the UK government on apprenticeships, known as the Apprenticeship Levy, created an administrative burden of 200 to 300 additional levy contracts per month.

"Our contract creation process was long and cumbersome, and we wanted to improve our first impression among our learners," explains Stacey Rowston, Course Advisor, Lifetime Training. "We needed to re-think how we delivered a better customer experience in an era where people expect immediacy."

Wanting to deploy electronic signature capabilities across its entire business, Lifetime Training chose Adobe Sign—the e-signature solution in Adobe Document Cloud— because of its recognized brand, its intuitive ease of use, and its seamless integration with Microsoft Dynamics 365. Adobe Sign required minimal training for staff, while at the same time, its tracking capabilities and audit trails allow Lifetime Training to easily comply with regulations.

Achieving regulatory compliance

Under the Apprenticeship Levy, UK employers generating revenue of more than £3 million per year are required to contribute a percentage of their payroll costs toward apprenticeship programs. As a result, employers need to complete a signed contract with their chosen training provider before any employees can begin their apprenticeship.



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*Piran Scott, Divisional Finance Director,
Lifetime Training*

To help deal with this extra workload, Lifetime Training deployed Adobe Sign integrated with Microsoft Dynamics 365. Through this integration, users can send, track, and sign contracts directly from the Dynamics 365 CRM system—anywhere, anytime, on virtually any device. Dynamics 365 data is pulled directly into the levy contract in Adobe Sign, minimizing data entry and errors. Once the contract is digitally signed by the employer, the finalized contract including completed data is filed back in the Dynamics 365 CRM system.

The digital workflow with Adobe Sign and Microsoft Dynamics 365 helps Lifetime Training achieve full compliance with Apprenticeship Levy regulations. Agents can only generate contracts once all necessary apprenticeship data has been collated, preventing any noncompliant apprenticeship contracts. Document tracking and audit trail capabilities provide valuable data to demonstrate compliance. Lifetime Training also leverages this data to continually refine and optimize its apprenticeship program processes and workflows.

“Our process with Adobe Sign is efficient, compliant, and creates a professional impression,” says Piran Scott, Divisional Finance Director, Lifetime Training. “The Adobe solution helps differentiate us and supports our position as an industry leader.”

Time savings of up to 90%

After success in supporting the apprenticeship program, Lifetime Training expanded its use of Adobe Sign integrated with Microsoft Dynamics 365 to contracts for its commercial training courses. Before deploying the digital workflow, agents would customize, print, and mail contracts and loan application paperwork to prospective learners, who would review, sign, and mail them back. Completed contracts were then scanned and stored in Lifetime Training’s IT system.

Many contracts, however, were returned incomplete, with missing information or signatures. Others would get lost in the mail. In these situations, agents would need to start the process over again. With up to 200 learner contracts per month averaging 19 pages each, the process consumed a vast amount of time and paper.

With the digital workflow including Adobe Sign and Microsoft Dynamics 365, learner contracts now can be prepared and distributed electronically in just 30 seconds. Previously it could take up to five minutes—a time saving of 90%. Similarly, contracts take as little as 24 hours to be completed and returned. Compared to the previous average of five days, the digital workflow helped achieve a time saving of 80%.

The mobile signature capability and daily automated reminder feature in Adobe Sign help speed completion time. Prospective learners can sign documents on any device, even a mobile phone, encouraging faster signing times. If learners are slow to sign the document, automated reminders gently encourage the learner to respond.



SOLUTION AT A GLANCE

Adobe Document Cloud

Adobe Sign

Microsoft Dynamics 365

For more information

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



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Up to 40% of paper contracts contained errors or issues that required follow-up, but with Adobe Sign and Microsoft Dynamics 365, that number has been reduced to fewer than 5% of electronic contracts. Collectively, these efficiencies are freeing Lifetime Training agents to spend more time selling courses or helping learners develop their careers.

“The old, paper-based process took so long that we risked losing time-pressured learner prospects to other training suppliers,” says Scott. “Now, with Adobe Sign integrated with Microsoft Dynamics 365, our agents can populate a contract while on the phone talking to a prospect, and press send. The prospect can electronically sign while on the phone with us, without any hold up. It’s a far more engaging process.”

Rowston agrees, adding: “Using Adobe Sign, the digital transformation has allowed our agents to leave their desks and get into the field to do what they do best: generate more sales, give valuable career advice, and strengthen the competitiveness of UK businesses.”