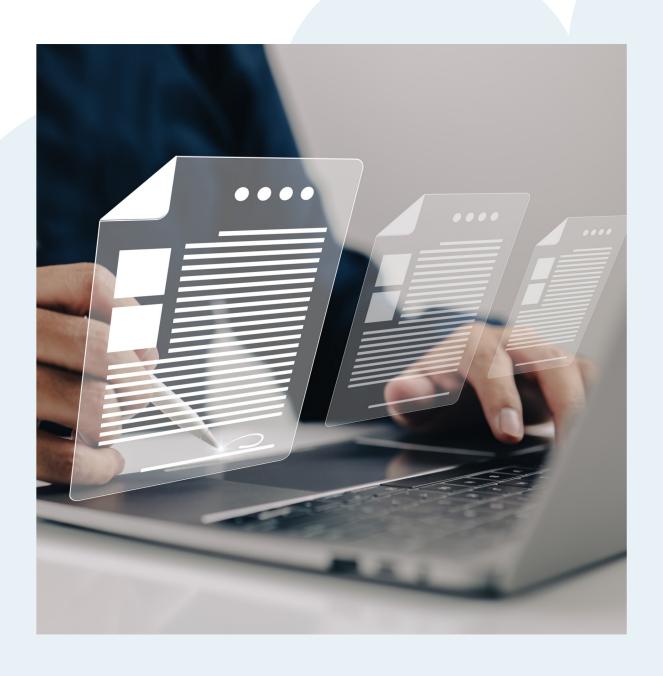# Art of the Possible:

E-Signatures

Cloud-Based e-Signature Tools

A cloud-based e-signature tool can effectively streamline and automate the process of gathering and storing signed contracts when used alongside a CRM and file storage tool. By integrating the e-signature tool into your existing CRM, you can optimize essential processes such as sending out documents for signature, tracking their progress, and securely archiving them once signed. Additionally, with the integration of a shared drive like Google Drive or Microsoft OneDrive, you can conveniently centralize signed contracts, thereby ensuring easy accessibility for future reference. This eliminates the need for manual tracking and paperwork, resulting in significant time and effort savings.

By leveraging integration technology, you can streamline the storage of signed contracts in your shared drive, enhancing efficiency and accessibility. With the use of an e-signature tool, the integration platform can automatically initiate the saving of contracts in the shared drive. This process involves the seamless connection of APIs between the e-signature, CRM, and shared drive.

To create a super efficient e-signature workflow, gather the information you need for the document that is to be signed via a form. Consider utilizing powerful tools like Google Forms or Microsoft Forms. These platforms allow you to create comprehensive forms tailored to your specific needs, ensuring all necessary information is collected for the document that is to be signed.

Once the form is completed, leverage the capabilities of integration services such as Zapier or Workato to seamlessly transfer the data to an e-signature tool like DocuSign or HelloSign.

This integration enables you to automate the workflow, triggering actions as soon as the form is submitted. The collected information can then be automatically populated into a pre-designed document within the e-signature tool.

To ensure a smooth approval process, configure an approval workflow within the e-signature tool. This functionality empowers you to define the individuals who need to review and approve the document before it proceeds to the signing stage. Additionally, you have the flexibility to assign multiple approvers and determine the sequence in which the approvals should occur.

Once the approval workflow is finalized, the e-signature tool will automatically dispatch the document to the designated signatories. They will receive an email notification prompting them to review the document and provide their electronic signature.

To streamline document management, leverage integration services once again to automatically transfer the signed document from the e-signature tool to a secure shared drive like Google Drive or Dropbox. This ensures that all signed contracts are stored securely and can be easily accessed for future reference.

By implementing this automated workflow, your nonprofit can streamline their document signing process significantly, reducing manual work and the potential for errors. Furthermore, this approach ensures that all signed contracts are securely stored and readily available for efficient retrieval.