DocuSign

Datasheet
CLM

Automate the Entire Contract Lifecycle with DocuSign CLM

Scale your digital contract processes to fit each team at your company

As companies mature, the volume and complexity of sales, procurement and legal contracts increase dramatically. While e-signature is a great first step, using email, spreadsheets and manual processes to generate, review, store and manage contracts isn't sustainable. It wastes time, creates risk and impacts revenue. To keep business moving and get ahead of competition, a digital end-to-end contract process must be a priority.

DocuSign CLM

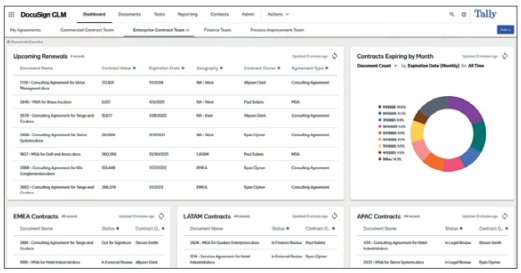
DocuSign CLM (Contract Lifecycle Management) allows you to streamline the contract lifecycle by automating manual tasks, orchestrating complex workflows and reducing unnecessary risk. It provides document generation, collaboration, workflow, a native integration with DocuSign eSignature and a searchable repository for completed agreements in a modern, accessibly-designed application optimized for desktop and mobile. This functionality is available in CLM as well as core business systems like Salesforce, Workday, SAP and more through best-in-class pre-built integrations. By enabling automation across the entire agreement process, you can do business faster, simplify compliance, and improve the employee and customer experience.

Document generation

Automated generation
Insert data from an input form or systems of record like Salesforce to populate each legally approved template with custom details. The contract is generated in seconds, with no hassles.

Advanced formatting
Get every detail perfect with dynamic tables, currency conversion, conditional logic to show/hide fields, and full customization for a professional contract every time.

Clause Library
Your legal team can define a library of pre-approved clauses and fallback options for non-legal users to leverage during negotiation.



Be confident with the leader in contract management

Industry leader
A consistent Leader in the Gartner MQ for CLM since 2020

Fast time to value
Experienced experts use best practices to get you up and running successfully and efficiently

AI that works
Real, field tested analytics that work with CLM to understand your contracts better

Complete Agreement Cloud
A full suite of solutions to automate the entire contract lifecycle

Built for scale
A highly available, secure infrastructure supports massive scale at many of the largest companies in the world

Santander · FLEXENTIAL · T-Mobile · ThermoFisher SCIENTIFIC · Unilever · FineMark National Bank & Trust · celonis · IKEA · Qlik

Collaboration

External review with version comparison
Easily send contracts by email to the counterparty for review and approval with the ability to quickly compare changes over time.

Internal review with commenting and tasks
Use real-time comments and tasks to easily collaborate with internal stakeholders in one place and accelerate time to approval. Review agreements faster with recommended actions and access a full audit trail for context on why changes were made.

Slack integration
Collaborate in real time with contacts and stay informed about tasks and pending actions in Slack.

Workflows

Workflow steps
Easily add and configure over 100 pre-built steps using a drag-and-drop editor to build the right standardized process for your contracts.

Conditional routing
Configure workflows that execute differently based on defined rules for ultimate flexibility and automation.

Workflow actions
Automatically trigger actions that notify users when they are required to participate or automatically move forward for fast execution.

Management

Central storage
Store contracts in a central, searchable location to establish a single source of truth for your legal department and set granular access permissions.

Dashboards and reports
Use standard and custom reports to uncover insights and monitor your contract process. Visualize each report with chart-based dashboards to track key KPIs.

CLM 360
Use rich, discoverable metadata including custom attributes across all of your agreements and parties. Track renewals, report on obligations, view agreement hierarchies and identify total contract values.

AI extraction
Use AI to automatically identify common attributes from contracts (e.g., effective date) and set metadata tags for improved analysis and organization without the hassle.

"There's no need for Legal to be directly involved in up to 90% of sales deals. DocuSign CLM gives us a way to automate the approval of repeat processes, only bringing in Legal where needed."

Ahmed Badr
General Counsel
GoCardless

"With DocuSign CLM, the speed of turning agreements around has gone from multiple days to a couple of hours or less."

Nicki Brock
Director of Enterprise Applications
KORE

"Rolling CLM out in three months for hundreds of account executives was no small task, but we got it done. We came in under budget and comfortably hit our target."

Sonu Nayar
Director of IT, HR and legal applications
Genesys

Admin & Integration

Full administrative control
Manage users, settings and more at the most granular and custom level from a fully featured administration console.

Leading security and uptime
The highest level of global information security assurance available today (ISO 27001) and leading uptime so it's secure and available when you need it.

Rich integrations
Prebuilt connectors and rich APIs enable key contract tasks to happen within third-party business applications like Salesforce, SAP Ariba and Workday.

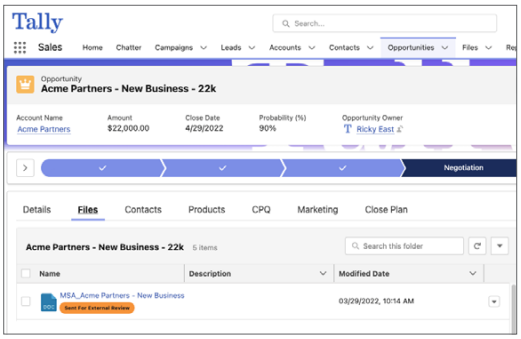
Native eSignature Integration
Get the native experience and functionality of the most robust e-signature solution on the market (sold separately).

Services

Extensive expertise
DocuSign has the largest customer success organization of agreement experts globally and an ecosystem of systems integrator partners to support you.

Purpose-built implementation
Experience hands-on help from our experts to get up and running quickly and ensure both administrators and users have the knowledge and skills needed to succeed.

Phased deployment
Establish the foundation for your Agreement Cloud solution and realize value quickly to extend your solution and deepen automation to truly transform your business.



Salesforce integration

Sample use cases

Sales
- Master Service Agreements
- Order forms
- Sales contracts
- Distribution agreements
- Special deal terms

Legal
- NDAs
- Regulatory or government filings
- Contract compliance audits
- Partner agreements

Procurement
- Supplier agreements
- Vendor contracts
- Purchase requisitions
- Statements of work

HR
- Offer letters
- I-9 forms
- Compensation agreements
- Performance management

Finance
- Client onboarding
- Account opening
- Asset transfer
- Claims settlement

Many more
- Franchise agreements
- Statements of work
- Commercial sale & lease agreements
- Subcontractor agreements
- Major gift agreements
- Tech transfer agreements

About DocuSign
DocuSign helps organizations connect and automate how they navigate their systems of agreement. As part of its industry-leading product lineup, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign platform to accelerate the process of doing business and simplify people's lives.

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