

Transforming Sales with DocuSign and Agentforce

Across industries, revenue-generating teams are losing valuable time to inefficient, error-prone contracting workflows that slow deal cycles and erode customer confidence. This document explores how the combined strengths of DocuSign and Salesforce, enhanced by the new IAM for Sales 2.0 solution and its native integration with Salesforce and Agentforce, eliminate these bottlenecks and accelerate revenue growth.

By unifying agreement generation, negotiation, approval, and signature in a single, streamlined experience, DocuSign and Salesforce can help organizations accelerate sales velocity, reduce risk, and deliver a superior buyer experience.

This document examines key pain points, and the value proposition of this integrated approach, outlining why now is the ideal moment for businesses to modernize their sales contracting processes.

DocuSign has collaborated with Salesforce for nearly two decades and was among the first independent software vendors (ISVs) to launch on the Salesforce AppExchange in 2006. This partnership has resulted in **over 10,000 joint customers** actively using our integration, millions of monthly transactions, and a deep integration across multiple Salesforce touchpoints, including Sales Cloud, Agentforce, and Slack with one simple goal.

Notwithstanding these achievements, there is untapped potential for further innovation for our joint customers, both the tens of thousands that are still not using any form of integration between DocuSign and Salesforce, as well as those limited to just using simple eSignature solutions. With DocuSign's Intelligent Agreement Management platform — covering the entire lifecycle of agreements — the potential for transformation is significant.

DocuSign's **forward-looking statement** applies to this white paper. The development, release, timing, and pricing of upcoming releases may change at any time and remain at the sole discretion of DocuSign. The information provided in this white paper should not be relied upon for purchasing, investment, or other decisions.



The “hidden drag” of poor agreement management practices on sales

Accelerating the contract phase is crucial for closing deals, especially when racing against quarter-end deadlines. Sales teams consistently encounter several key obstacles that can stall this final step such as:

- 1 Inefficient and time-consuming manual processes
- 2 Lack of visibility and control over the agreement process
- 3 Poor data access, leading to missed opportunities and revenue leakage
- 4 Disconnected systems and fragmented customer experience
- 5 Adapting to the modern, often remote, work environment

Ensuring that all activities are synchronized and properly updated in Salesforce can lead to slowdowns and inefficiencies. These challenges can persist even after a deal is closed, as poor agreement management may continue to hinder business operations, particularly during contract renewals when sales, legal, and finance teams must revisit and manage existing agreements.

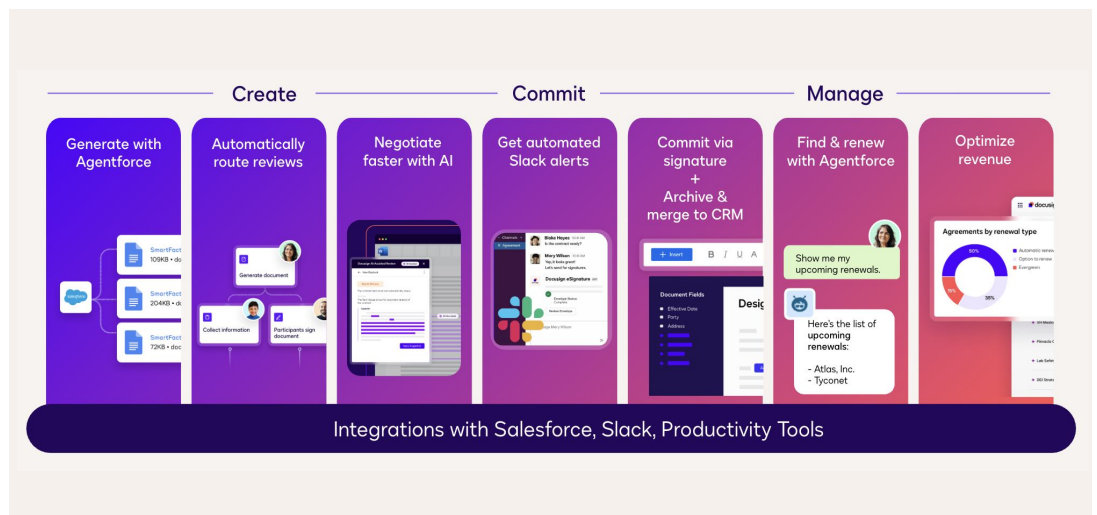
Further compounding the problem is that large organizations have thousands of historical contracts that are difficult to find, with key information about payments, discounts, and schedules all locked away.

Introducing: IAM for Sales (2.0)

These challenges are solvable; the vision for the new, upgraded, IAM for Sales solution is to directly address these pain points. The initial launch of IAM for Sales last year, which brought improved search and visibility of historical sales agreements via Navigator, was a good first step. But there was much more work to do to address the “hidden drag” on the Sales function.

The upcoming IAM for Sales 2.0 solution is designed to allow sales teams to work seamlessly within their CRM, relying on a single source of truth accessible to all cross-functional stakeholders, through deeply embedded *and* integrated IAM capabilities to generate sales contracts, negotiate and approve them (via Agreement Desk), and send them for signature, all powered by configurable workflows (powered by Maestro). Deal progress will be fully visible, enabling sellers and stakeholders to track every stage of the contracting process. Sales leaders can get a bird's-eye view of bottlenecked deals due to stalled approvals or negotiations over problematic terms. Sellers will also be able to use Agentforce, Salesforce's agentic platform, to create agreements automatically with minimal input.

Visibility into agreements doesn't stop once the contract is signed. Docusign's AI-powered repository, Navigator, will also be embedded, bringing Iris-powered AI insights into the most critical terms sellers need to stay on top of renewals, for example. The deep integration enables sellers to easily locate all agreements associated with a customer account. Once an agreement is executed, it will automatically appear in Navigator and be visible directly within Salesforce, where users can sort, filter, and search agreements as needed. Agreements will be mapped back to the corresponding account, removing the need for manual uploads or data re-entry. Sellers will also have the ability to query their agreements with natural language via Agentforce actions.



With IAM for Sales, teams can:

Accelerates deal velocity and shortens the sales cycle:

By automating and streamlining the agreement process, Docusign IAM helps sales teams close deals faster. You can close deals faster and improve turnaround time, as most agreements are signed in under a day, freeing up sales reps from administrative tasks to focus on selling.

Increases seller productivity and efficiency:

Docusign IAM for Sales empowers sales teams to be more productive and efficient by automating manual tasks and providing them with the tools they need to succeed. You can boost team productivity and efficiency by providing a single, mobile-friendly platform for automated document generation and centralized agreement management.

Protects revenue and enhances compliance:

Docusign IAM for Sales helps to reduce revenue leakage and support compliance with legal and business standards. That way you safeguard revenue and reduce risk with enforced templates, automated approval routing, and a complete audit trail.

Turns visibility into strategy with AI-Powered insights:

Docusign's AI capabilities help to unlock the valuable data trapped in agreements, providing sales teams with insights that can be used to improve performance and drive growth. This will help you gain a strategic advantage by using AI to analyze agreement data, which helps identify key trends, manage opportunities proactively, and inform sales strategy.

Enhances the customer experience:

A smooth and efficient agreement process can have a significant impact on the customer experience, helping to build trust and loyalty. It means you can improve customer satisfaction and loyalty by offering a simple, convenient, and fast digital signing process that allows customers to get value from your services more quickly.

Early adopters are already utilizing these new capabilities to gain greater visibility into their sales contracts.

What's coming and when

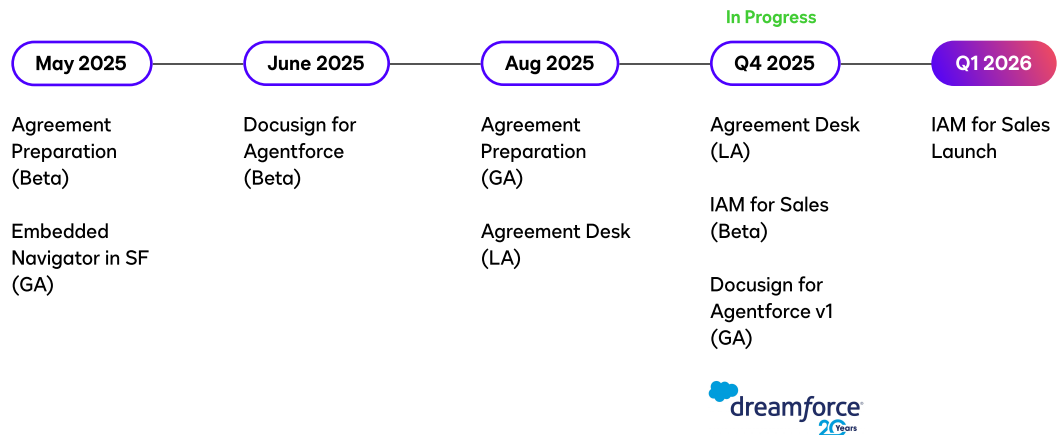
This new upgraded version of IAM for Sales (2.0) is targeted to launch in early 2026. That said, several components, including the embedded Navigator view in CRM, agreement preparation capabilities, and new Agentforce actions, have already been launched in the past quarter to existing customers with either IAM for Sales plans, or an IAM Core plan with the Salesforce add-on. Additionally, in August 2025, core IAM capabilities central to commercial contract approvals and routing—such as **Agreement Desk**—were introduced in limited availability (LA). Many of these actions will be exposed to partner SIs, ISVs, and builders (including IT developers) to create their own agentic solutions in Agentforce, via our new IAM Model Context Protocol (MCP) server.

In the coming months, all these features will be available in a deeply integrated beta version of IAM for Sales 2.0 within Salesforce. In early 2026, the offering is expected to become generally available, bringing agreement preparation, Agreement Desk, flexible Maestro-powered workflows, and Iris-powered Agreement Insights in Navigator directly into CRM. This integration will eliminate the need to search for sales contracts or switch between systems.

CALL TO ACTION

An Open Beta of IAM for Sales will launch in early November; we invite customers to join using [this link](#).

Release timelines



Beyond the upcoming launch of IAM for Sales 2.0, even more co-innovation will come in 2026 and beyond:

Docusign Legal Helpdesk Agent for Agentforce:

Docusign will transform the collaboration between legal, sales and finance with the launch of Agreement Desk in Salesforce. The Legal Helpdesk Agent for Agentforce takes this collaboration to the next level, enabling proactive Agentforce-to-Docusign Iris actions that act on common legal requests from sales teams to analyze contractual language for human-in-the-loop review, and automatically process low-risk requests. This frees up legal teams to focus on more complex, higher-value requests and approvals over tedious, error-prone analysis and authoring.

Docusign IAM for Slack:

Organizations rely on Slack to collaborate and stay on top of their work. IAM for Sales will include enhanced notifications in Slack, with generative AI summaries for intake requests, approvals and negotiation history, so stakeholders can review and approve requests, all without leaving Slack. Our integration will make it easy to find agreements, share them, and have collaborative discussion (e.g. channels sync'd with agreement lifecycles) to streamline negotiation and approvals.

Salesforce-enhanced Party View:

Teams working in IAM's UI can now make smarter, more informed decisions with 'Party' views of their customers in Docusign, bringing together agreement insights from Docusign and customer insights from Salesforce into a single view.



About Docusign

Docusign brings agreements to life. Over 1.7 million customers and more than a billion people in over 180 countries use Docusign solutions to accelerate the process of doing business and simplify people's lives. With intelligent agreement management, Docusign unleashes business-critical data that is trapped inside of documents. Until now, these were disconnected from business systems of record, costing businesses time, money, and opportunity. Using Docusign IAM, companies can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).

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