

# Digitise agreements and exceed customer expectations

The speed, simplicity and convenience of digital interactions are reshaping customer expectations. Traditionally manual and cumbersome business transactions – such as loan applications, health insurance enrolment, real estate documents and mobile phone subscriptions – are no longer necessary. Failure to meet these expectations can lead customers to abandon the process prematurely or switch to competitors that offer better experiences.

Poor experiences are a symptom of a bigger problem: underlying system fragmentation and siloed operations that complicate customer interactions. Despite digital advancements, agreement processes like filling in forms and verifying identities are often outdated and disconnected. Intelligent Agreement Management (IAM) is a new category of cloud software that helps streamline and automate agreement processes. **Docusign IAM for CX** enables you to easily embed digital agreement experiences into existing workflows and applications to:

## Increase conversions

Optimise agreement touchpoints for speed and security to boost your conversion rates. Save your customers time by pre-filling data, embedding forms into existing workflows and tailoring steps based on customer attributes like risk profile.

## Minimise agreement friction

Empower customers to agree instantly, practically anywhere, on virtually any device and through any app with our secure and fast signing solutions. Reduce abandonment and fraud risk while maximising customer satisfaction and interoperability.

## Serve your customers better

No-code orchestration allows you to easily adapt agreement processes to business needs or regulatory changes, ensuring you consistently deliver trusted, compliant services that elevate customer satisfaction and loyalty.

## Build trust

Give your customers peace of mind that their data is protected. Backed by enterprise grade security, controls, access and organisational management, we prioritise trust in every interaction.

## Results

95%

reduction in form completion time  
**BAI Communications**

>832%

increase in transactions  
**Calendly**

3%

increase in conversion rate  
**Driva**

"This is an intensely competitive industry, and customers will turn away if your process feels like a hassle. **With Docusign, we'll continue finding new ways to reduce inefficiencies in our processes so that we can handle more business with a similar-sized staff.**"

**Michael Ko**  
Head of Product  
Driva

## DocuSign IAM for CX

DocuSign IAM offers a suite of capabilities and platform services built for the unique needs of teams, organisations and industries that engage customers in the digital age. In today's highly competitive business landscape, a superior agreement experience can be the key differentiator in attracting and converting loyal customers at scale. Our preconfigured IAM for CX gives you the power to deliver exceptional customer experiences, drive growth and increase brand loyalty by transforming cumbersome agreement processes into smooth, engaging customer journeys.

### DocuSign eSignature

Deliver an intuitive, mobile-friendly signing experience across virtually any device, allowing your customers to securely send, sign and track contracts, consents and other agreements in minutes.

### Web Forms

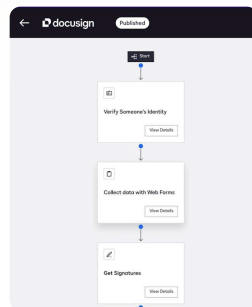
Enable a user-friendly, dynamic form-filling experience that's accessible across various devices, helping you reach a broader customer base.

### Identify and Verify

Embed convenient digital fraud-proofing into agreement workflows like out-of-the-box Data Verification capabilities that validate user-input information against trusted databases in real time and ID Verification that leverages AI-enabled biometric liveness detection, verification of most identity documentation and SMS Authentication.

### DocuSign Maestro

Build a variety of business workflows without writing a single line of code to digitise your agreement journeys end to end.



### DocuSign App Center and Integrations

Share data seamlessly across systems when you bring in partner apps to amplify your agreement workflows, and embed IAM for CX into existing tools with 900+ pre-built integrations.

### Signing Insights

Identify and remedy friction in the agreement process, allowing you to continually optimise an agreement experience that attracts prospects and effectively converts them into loyal customers at scale.

## Use case examples

### Sales

- Sales contracts
- Licensing
- Memberships
- Order forms
- Renewal agreements
- Quotes

### Services

- SLAs
- Service orders
- Repair contracts
- Cost estimates
- Evaluation agreements
- Completion approvals
- Permissions

### Financing

- Loan applications
- Lease contracts
- Equipment financing
- Mortgage agreements
- Credit card sign-ups
- Recurring payments

### Other agreements

- NDA's
- Waivers
- Enrollment
- Intake forms
- Consent forms
- Terms and conditions
- Delivery contracts
- Management contracts
- Compliance documents
- Rental agreements

Visit [DocuSign IAM](#) and [connect with our sales team](#) to learn more.

## About DocuSign

DocuSign brings agreements to life. Over 1.5 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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