DocuSign®

monday.com

Accelerate Sales with DocuSign eSignature for monday.com

Growing your business calls for managing a whole slew of roles, from finance to marketing to customer service and more. When you want to outpace your competitors, speed is your ally. The ability to produce a document faster than your competitors, and make the process easy and frictionless, gives you a valuable advantage.

DocuSign eSignature for monday sales CRM is a streamlined solution that integrates seamlessly into your sales process. You can originate contracts, distribute to signers, and receive signatures, all within monday sales CRM. This saves you time, speeds up time to close, gives visibility to the status of deals and improves customer experience.

Sales teams using DocuSign eSignature report

8%
increase in win rate

41%
decrease in time to close deals

Use cases

Sales contracts
NDAs
Partner agreements
Vendor contracts
Marketing agreements
Corporate development

Key capabilities

Save time
By integrating DocuSign eSignature into monday sales CRM, your sales team never has to leave the platform. You can populate documents with customer data already stored in your CRM database. Fewer clicks and less time chasing down approvals frees up your sales team to expedite contracts with greater speed and efficiency.

Speed time to close
Growing companies need to move fast. With eSignature you spend less time revising errors thanks to auto-populated contact fields. Plus, once a customer has the contract, they can sign immediately using their computer or mobile device. A faster close is a bigger win for both your company and for your customers. You recognize revenue sooner, and your customers receive their products and services faster.

Increase visibility into deal status
eSignature provides the visibility you and your customers need. With the eSignature app in monday sales CRM, you can view the status of your contracts in real time, allowing your team to do what they need to do to move forward—avoiding the stalls that can delay signing a contract.

Deliver a superior customer experience
DocuSign eSignature provides a polished and streamlined interface for growing organizations. You never get a second chance to make a first impression, but thanks to eSignature, you can be sure that you make a good one every single time.

The tools available with eSignature also improve customer experience in another key area: trust. With eSignature for monday sales CRM, you avoid errors introduced by re-entering key information. Plus, eSignature's audit trail means you (and your customer) know where you stand at all times.

How to integrate eSignature into monday sales CRM

Integrating DocuSign eSignature into your monday sales CRM interface is simple. These steps tell you how; they are also shown in this video.

1/   From the monday.com app marketplace, install the DocuSign app. Once you've done so, refresh the page to add the new column to your interface.

2/   Click the "Integrate" button, search for the app, and add it to the board. You will automatically be sent the integration recipe to configure the app settings.

3/   Set the recipe to read: "When an envelope associated with this email is updated, update Status, File, and Last Updated."

4/   Open the DocuSign eSignature item view. Prepare to send a document by clicking "Start Now" or "Send Envelope." Add files and recipients. Then add signature fields to guide your recipients through the document.

Status and Last Updated will reflect progress on the envelope signatures and show when the last update was made. The Files column will receive the signed documents of your recipients and include an official summary document.

Next steps

Get eSignature for monday sales CRM for all the tools you need to manage the full contract lifecycle and support your sales team.

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About DocuSign
DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, 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 Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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