Bring People, Agreements, and Information Together

Digital agreements are quick and convenient. They're how modern business gets done. But complex, multi-step agreements—like opening a new investment account or managing consent forms for healthcare patients—can be frustrating for both customers and businesses.

And that frustration has negative consequences: Studies show that when faced with a complicated form, **67% of visitors will abandon it.**

Deliver stress-free customer experiences

Docusign Workspaces takes the stress out of agreements by bringing everything—and everyone—together in a single workspace. Your customers won't have to click through endless notifications, re-enter the same data numerous times, or jump through identity verification hoops. And your teams won't have to search everywhere for the latest version, waste time copying data between systems, or chase signatures.

Four key ways Workspaces improves the agreement process for everyone:

Simplified experiences

Keeping track of all documents and notifications in one place reduces frustration and abandonment. One email, one link, all in a single workspace.

Enhanced collaboration

Everyone works together in the same space, with a clear view of progress and responsibilities. No more endless email chains or confusion about who's doing what.

Accelerated agreements

Create a more efficient and organized transaction process that saves time, eliminates rework, and brings clarity to your workspace.
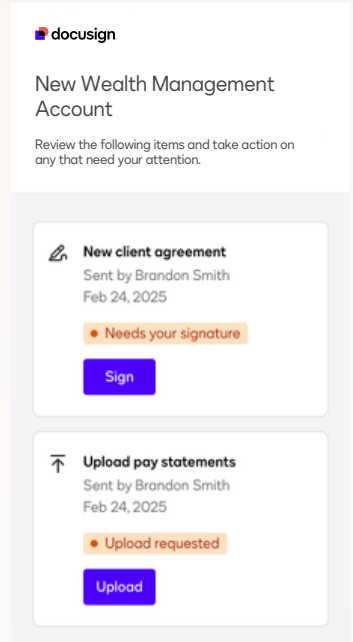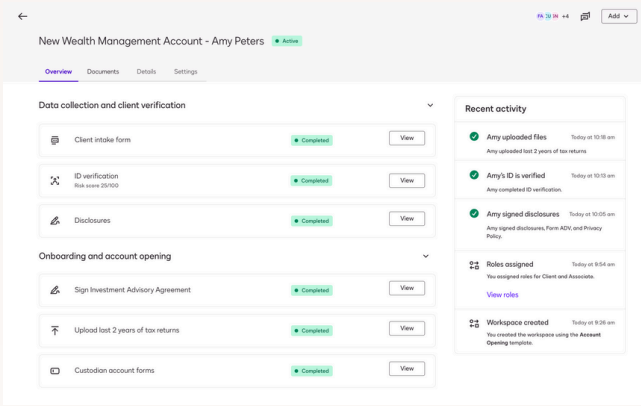
Robust security

Role-based permissions ensure that only authorized people have access to sensitive information, and you can easily integrate **ID verification** for added security.

Your customers get a reimagined experience where every interaction feels effortless and every client feels valued. And your teams deal with fewer bottlenecks, less manual work, and fewer compliance headaches.

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New Wealth Management Account

Review the following items and take action on any that need your attention.

New client agreement
Sent by Brandon Smith
Feb 24, 2025

● Needs your signature

Sign

Upload pay statements
Sent by Brandon Smith
Feb 24, 2025

● Upload requested

Upload

Results

> "I loved having each person's documents in a centralized space for easy tracking and reporting. Instead of wasting time chasing down files, I could simply click a name and instantly access every document they completed. Workspaces streamlined our workflow and made everything more efficient."

Shamerra Smith
Morgan State University

Powerful features, simple interface

Workspaces offers numerous innovative features designed to streamline multi-step agreements, including:

Add, request, and send
Add documents for signature, request documents from the participant, and send envelopes all from your workspace.

Assign roles, permissions, and access
Ensure only the right people have access to the workspace and specified documents.

Built-in authentication
Ensure a secure agreement process by authenticating users before they enter the workspace using Docusign Identity Verification.

Streamlined email notifications
Participants receive a single email notifying them of all required tasks, providing a guided experience, and reducing confusion.

Batch send
Send all items requiring action simultaneously, reducing manual steps in the preparer experience.

Custom APIs
Weave Workspaces into your existing platforms with the Workspaces API (Beta), making it easy to create and manage workspaces programmatically, connect to internal systems, and handle complex workflows at scale.

Optimized for mobile
Workspaces is supported in Docusign native mobile apps for both iOS and Android.

Use case examples

Client onboarding
Account opening
Patient authorization forms
Account maintenance and servicing
Consent forms

The future of agreement collaboration is here

Through a single, secure, and collaborative hub, Workspaces simplifies multi-step agreement processes, removing hassles and allowing users to focus on what's most important.

Workspaces is part of the **Docusign IAM** portfolio (**IAM for CX**, **IAM for Sales**, and **Enterprise** applications) and is available as an add-on service in **Docusign eSignature** (Business Pro and Enterprise Pro plans).

Ready to bring people, agreements, and information together in Workspaces? **Contact us today**.

About Docusign

Docusign brings agreements to life. Over 1.6 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 to, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).