

Accelerate and Streamline Agreement Preparation

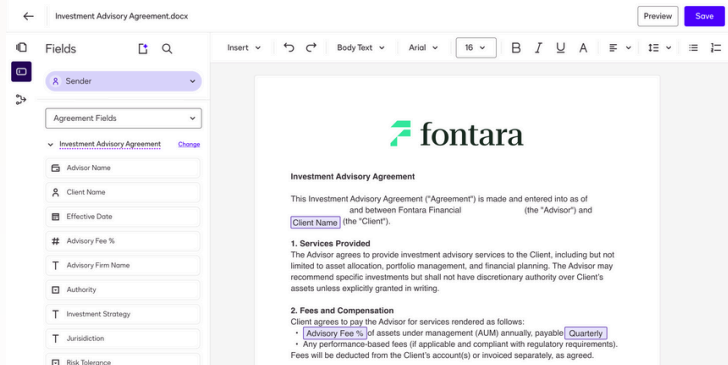
Drafting an agreement is the first step in defining a new business relationship with customers and employees. Yet, creating professional-looking agreements that reflect your organization's current terms and accurate information can be riddled with challenges. Incorrect data, misaligned text, and out-of-date contract language can result in expensive and frustrating errors and even lost deals. Most document generation solutions involve templates that are hard to use and manage due to their complexity, manual nature, and lack of centralized management.

Docusign Agreement Prep enables customers to efficiently create and manage templates that result in professional agreements with accurate data—data that's connected across the entire agreement management process. Agreement Preparation is easy-to-use, seamless, and built for your business, leveraging intuitive template creation, centralized template management, and integrations to improve accuracy and efficiency.

Simplify template creation and administration

Agreement Template Builder (ATB) is a simple user experience that makes it easy to build and maintain customizable agreement templates. Easily create templates with AI-suggested data fields that appear directly in the template based on agreement type. Generate customized agreements with a single click with confidence that they'll include the most accurate organizational information. Manage templates in a centralized location, making it easy to find updates, monitor where templates are being used, and reduce the overall volume of templates.

Drive efficient template creation with suggested fields based on agreement type



Results

55%

Are more likely to report outperforming financial goals with advanced contract creation capabilities.
(Deloitte and Docusign Digital Agreement Study)

0%

Reduced not-in-good-order (NIGO) error rate from 25% to zero.
(Goosehead Insurance)

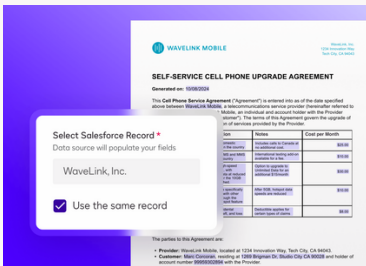
Dynamically generate tailored agreements

Conditional logic ensures agreements are dynamically updated based on the data that's pulled in, resulting in customized documents that accurately reflect the nuances of a specific customer, partnership, or deal (products purchased, address, etc.). Instead of updating multiple documents, changes can be made to a single template and changes will be reflected in all variations of the template—significantly reducing administrative overhead.

Connect data sources of truth throughout the entire agreement lifecycle

Custom data within the templates can be entered at the point of generation or pulled from existing third-party systems of record, like Salesforce, ensuring consistent data within every document. Data from the template is pulled through the entire agreement process, so the completed agreement is stored and available with the most accurate information.

Generate agreements with third-party data



Agreement Prep is part of the DocuSign IAM platform that helps organizations create, commit, and manage agreements with efficiency and ease. Accelerate the agreement process by empowering your team to create custom agreements in seconds with **Agreement Prep**.

Contact us today to learn more.

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).

Use case examples

Business-to-business sales

- NDA
- Quotes
- Sales contracts
- Statements of work
- Master service agreements
- Renewal contracts
- Reseller agreements

Consumer account opening and onboarding (via third-party websites)

- Quotes
- Sales contracts
- Order forms
- Memberships
- Waivers
- Enrollment
- Consent forms
- Service agreements
- Loan applications
- Credit card signups

Employee hiring and onboarding

- NDA
- Offer letters
- Employment contracts
- Background checks
- W-4 and state tax forms
- I-9 forms
- Payroll forms
- Handbook acknowledgment

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