

Customize, Connect, and Automate Your Agreement Workflows

For every agreement that gets signed, there is a process for creating and managing them. When these processes are manual, time is wasted on repetitive tasks and re-entering data across systems, which can result in delays, errors and even lost revenue. A manual process can also create disconnected experiences for your customers, who get bogged down in redundant paperwork.

DocuSign Workflow Builder solves these problems by automating the end-to-end agreement process, without writing any code. With Workflow Builder, you can create customized workflows that connect all the tools and data across your workflow, so agreement processes are more efficient, and deliver a seamless customer experience.

Your team can use Workflow Builder to automate the steps in your existing agreement processes, leveraging core DocuSign features like eSignature, Web Forms, Identity Verification, and Document Generation, ensuring information flows easily and securely. Then, extend your workflows by connecting to third-party apps in **DocuSign App Center**.

Work smarter and faster

Boost efficiency with custom workflows designed to match your business processes—no code required

Increase visibility

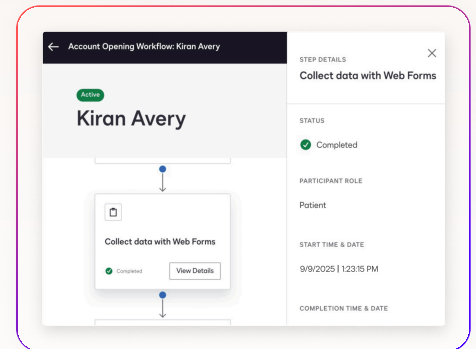
Track and record actions taken at every step of the agreement process, simplifying recordkeeping and compliance efforts

Reduce costs

Minimize costly standalone integration projects by seamlessly extending workflow capabilities across your tech stack

Close business faster

Provide a hassle-free customer experience by reducing manual data entry and saving customers valuable time



Workflow Builder capabilities

Identity Verification

Build a signer verification step into your agreement workflows

Web Forms

Capture data and dynamically populate content into agreements for signature

eSignature

Add electronic signatures to your agreement automation workflows

Document Generation

Use workflow data to automatically generate documents leveraging dynamic templates

App Center

Extend your workflows with partner apps like Google, Microsoft, ServiceNow, and more

Workflow templates

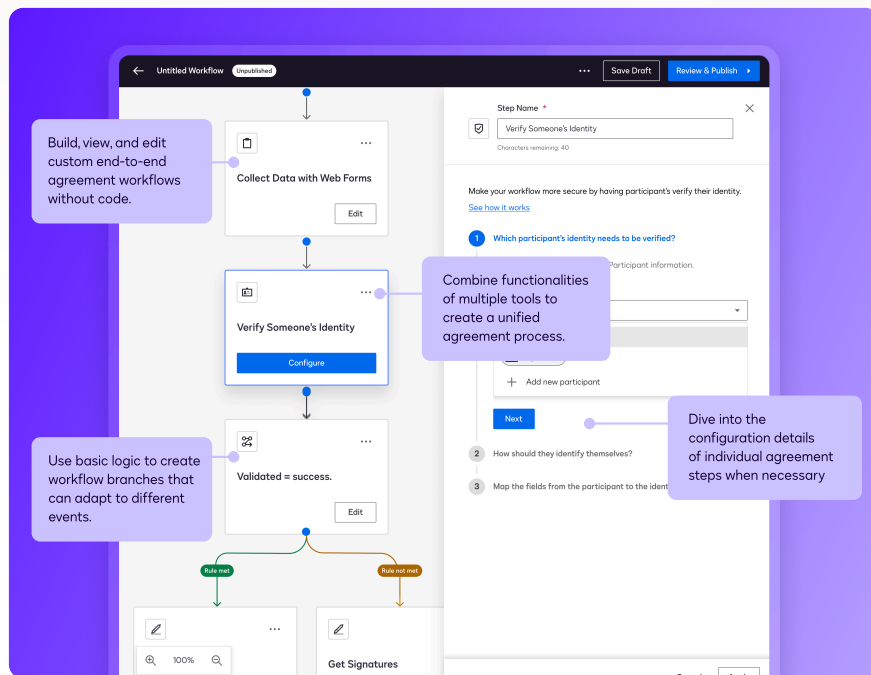
Get started quickly with out-of-the-box templates for common agreement workflows

Agreement Desk

Kick off a workflow from a request to track and manage reviews and approvals

Streamline your agreement process

Workflow Builder can be used by any team to map out the steps of their agreement process in a flexible, modular layout. The canvas builder makes it easy to visualize which tools need to be used, the correct step sequence, the criteria required for advancement, and what conditionality logic can be applied to adapt the workflow based on inputs or events. Here's what it looks like:



“Workflow Builder gives us control and autonomy over our processes. We used to need developers to make any changes, but **Workflow Builder’s no-code solution** allows us to be agile and quickly adapt to changes without relying on technical resources. It has helped us streamline our processes, reduce bottlenecks and speed up customer response times.”

Systems Integration Lead
OnTrack 401(k)

Deliver a seamless customer experience

Make it easy for your customers to kick-off a workflow by embedding a link in your website or email. Save customers valuable time by reducing manual data re-entry when you capture customer information from a 3rd party app, Web Form, or ID. Then, reach your customers where they are by delivering real-time notifications via SMS, or WhatsApp to speed up the signing process.

“Workflow Builder will have a huge impact on our business. It allows us to automate the administrative work, so agents can spend more time selling properties and closing deals. **This is the future of real estate.**”

Manager - Digital Transactions
Coldwell Banker

DocuSign Workflow Builder is a core platform service powering the **DocuSign IAM** portfolio. **Contact us** to learn more about how your team can use Intelligent Agreement Management.

About DocuSign

DocuSign brings agreements to life. Over 1.8 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).

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