

Maximise seller productivity with better agreement processes

While technology has made it easier for today's sales professionals to reach more prospects, they still face a growing list of challenges that make it harder to interact with clients and close deals. Sellers should be selling, but they're often mired in agreement inefficiencies and administrative burdens that severely limit their productivity—frustrating customers and negatively impacting the bottom line.

For sales teams looking to boost their productivity and value capture, the agreement process is ripe for transformation that delivers an immediate impact. Intelligent agreement management (IAM) is a new category of AI-powered cloud software that helps streamline and automate go-to-market agreement processes while unlocking the power of valuable data trapped in traditional files. **Docusign IAM for Sales** modernises and simplifies how agreements are drafted, negotiated, and executed. Static documents become data-rich assets—empowering sellers to:

Boost seller productivity and deal velocity

Automatically generate signature-ready agreements using pre-approved templates and data from Salesforce, improving collaboration by reducing compliance issues and review cycles.

Make smarter decisions

Leverage AI and analytics to search faster and uncover hidden opportunities for expansion. Automatically identify and extract favourable terms, track renewals, and accelerate legal review.

Reduce business risks

Reduce contract and compliance risk by improving visibility for all collaborators and reviewers throughout the contract generation, negotiation, and execution process.

Extract more value from your deals

Gain unparalleled visibility into past and current agreements with a centralised, searchable repository. Surface data regarding contract value, key milestones, and renewal terms to drive upsell and cross-sell opportunities.

Results

70%

decrease in number of steps for creating an order form
(**Tipalti**)

> 800%

increase in e-signature transactions
(**Calendly**)

99%

reduction in templates, from 400 to 3
(**Checkr**)

“With Docusign Gen for Salesforce, we were able to consolidate **400 templates down to three**, which has made everything faster and more manageable.”

Travis Lee
Head of Revenue Systems
Checkr

DocuSign IAM for Sales

DocuSign IAM offers a suite of capabilities and services built for the unique needs of teams, organisations, and industries. Our preconfigured IAM for Sales application helps your team accelerate and optimise revenue by automating the agreement process. Free sellers from the burdens of administrative tasks so they can better engage with customers, optimise their account strategies and discover more revenue opportunities. IAM for Sales plugs into popular CRM and productivity tools, meeting sellers wherever and however they work. Empower your sellers to close deals faster, offer a superior signing experience and unlock greater revenue potential from every agreement with AI-powered analytics, driving significant growth for the business. The IAM for Sales application includes:

Document Generation for Salesforce

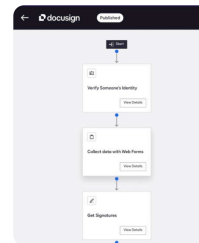
Automate the generation of customised agreements from Salesforce. Empower your reps to effortlessly generate polished agreements using pre-approved legal language without leaving the CRM they already know.

DocuSign eSignature

Meet customers where they are with a mobile-friendly, multi-channel signing experience across virtually any device and communication platform like WhatsApp and SMS. Customise agreements with your brand for a professional experience for both senders and recipients.

DocuSign Maestro

Boost productivity and speed with custom, no-code workflows that automate any agreement process to your business needs. Connect the dots by seamlessly sharing data across systems and workflows when you bring in partner apps through the **DocuSign App Center**.



DocuSign Navigator

Centralise agreement management and analysis across the organisation, employing AI-powered data extraction to identify and store specific attributes like renewal dates, contract value and party names—standardising agreement data and facilitating better reporting.

Integrations

Embed IAM for Sales into existing tools with 400+ pre-built integrations.

Learn more about **IAM for Sales** and **connect with our sales team**.

Use case examples

Proposals and contracts

- Sales contracts
- Statements of work
- Master service agreements
- Quotes
- Proposals
- Discount lists
- Renewal contracts
- Terms and conditions
- Distribution agreements
- Reseller agreements
- Licensing agreements
- Partnership agreements

Order management

- Contract amendments
- Purchase orders
- Change orders
- Service level agreements

Billing

- Financing agreements
- Invoices
- Payment authorisations

Other agreements

- NDAs
- Work orders
- Service agreements
- Internal approvals

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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