

Agreements Made Effortless

Your blueprint for scaling agreement management with Salesforce and Docusign

Modernizing contract execution isn't just about agreements or digital transformation in isolation—it's about the unique power of bringing your system of record, your agreement platform, and your operational workflows together into one unified strategy.

By embedding Docusign Intelligent Agreement Management (IAM) directly into the CRM your teams use every day, you instantly turn administrative friction into enterprise momentum. Below is the step-by-step blueprint and proven ROI of building a connected agreement ecosystem.



About the Partnership

For over 20 years, Docusign and Salesforce have partnered to embed seamless agreement workflows into your CRM. Keeping Salesforce as your command center maximizes platform ROI while accelerating deal velocity.



About Docusign IAM

Docusign IAM transforms disconnected contracts into intelligent, automated workflow—helping teams sign faster, manage risk, and extract continuous value from every agreement.



Build Your Blueprint

Contact our sales experts to explore how embedding Docusign IAM into your Salesforce environment can drive immediate ROI for your organization:

www.docusign.com/contact-sales

Your 3-step blueprint for success

Following the blueprint from \$6.6B HR leader Insperity, organizations can scale from transactional eSignatures to full Agreement Intelligence in three practical steps:

1 Establish initial impact

Don't attempt to overhaul every department at once. Anchor your initial deployment inside Salesforce by targeting 1–2 high-volume, low-complexity agreement workflows—such as standard NDAs or sales proposals—using automated document generation.

2 Expand cross-functionally

Follow the data trail beyond Sales. Once your CRM foundation is secure, extend your agreement workflows to other high-volume departments by deploying **Docusign IAM** to unify reviews, approvals, and post-signature tracking on a single platform.

3 Integrate AI and agreement intelligence

Layer **AI-Assisted Review** onto your IAM framework to automatically analyze third-party agreements against corporate playbooks, de-risk negotiations, and extract critical post-signature obligations and renewal dates.

The power of connected agreements

When you eliminate agreement silos and connect Docusign directly to your Salesforce CRM system of record, organizations like **Insperity** unlock massive efficiency and direct cost savings:

70%

Faster processing

<2 days

Average turnaround time

\$34.40

Average cost savings