docusign

Guide to Intelligent Agreement Management

eBook

Agreements are a part of nearly every business process at an organisation. Every team has a way to create, commit to, and manage business agreements. For most teams, that process involves manual steps to track data across different systems that are useful for business but not designed specifically to handle agreement work (Word, Excel, Salesforce, Google Drive, email, etc.). These technologies don't connect to the systems that run your business to fulfill the agreement promises.

Because of that disconnected toolkit, the end-to-end agreement process is likely full of steps that require an employee to manually move agreement data out of one system and into another. All that shuffling is a guarantee that data will get lost between steps or trapped in a file format that isn't analysable.

These manual processes might get agreements done, but they also cause problems: unnecessary delays, nonstandard terms, missing documents, late renewals, etc. These frustrations waste employee time and cost an organisation money.

Agreement Trap

The value your organisation loses due to agreement workflows that use disconnected technologies and inefficient manual handoffs.

We call that series of painful and expensive consequences the **Agreement Trap.**



Intelligent Agreement Management solves the Agreement Trap

Intelligent Agreement Management (IAM)

AI-powered cloud software that connects and automates every step of agreement work. It collects data about an agreement throughout its lifecycle so that information can be analysed and turned into value.

It's a single platform built specifically to handle the work involved in the end-to-end agreement process.

IAM connects to your favorite everyday applications so data automatically syncs without anyone copying and pasting. Anyone in the agreement process can use IAM to check the status of a document, so visibility is instantly improved. Since agreements are created on IAM and never leave, they don't go missing.

If your team has problems related to the outdated way you handle business agreements, it's time to consider IAM.



Annoyed with agreement activities? You're not alone. Deloitte and Docusign research found that:

62%
of professionals struggle to locate existing contracts

45%
manually input data into contracts rather than import it from other systems

52%
wait too long for identity and notary verification

54%
lack the tools to automate agreement tracking and analytics

When was the last time your team reviewed your end-to-end agreement process? A good way to determine whether you need IAM is to audit the technologies and processes you currently use. As you go, note which steps are manual and which are automated. Add up how much time is spent waiting for routine handoffs. Ask the involved employees what they would change.

To get you started, here's an outline of the three stages in a normal agreement process. It includes common activities and related pain points that indicate it's time to upgrade with IAM.

	Create	Commit	Manage
Activities	Prepare an agreement internally and negotiate terms with external parties	Collect signatures to finalise an agreement	Locate completed documents to answer questions about the terms and track data
Signs you need IAM	Inability to locate previous agreements Inefficient, repetitive internal approvals Manual data entry	ID verification causes complexity and delays No tools to automate signature collection in the correct order	Poor agreement search tools Manual data entry to track and enact agreement terms No tools to analyse contract data

Companies with disconnected agreement management workflows spend

18% more time

working on agreements

On average,

21% of revenue is deferred

to the next reporting period due to slow agreements

Source: Deloitte and Docusign, Unlocking the Value of Agreement Management

Benefits of IAM

IAM brings a series of improvements that will impact almost every team. Here's how you can expect IAM to impact agreement work at each stage:



Increased efficiency

By replacing manual work with automation, IAM gets agreements done faster. Better clarity around responsibilities will remove several internal review bottlenecks and reduce time spent waiting for approval.

More consistent agreement language

By preapproving templates and common agreement copy, legal teams can minimise risk and accelerate internal review.

Enhanced productivity

Employees can let technology handle time-consuming administrative tasks, allowing them to spend more time on high-value strategic work.

Fewer errors

IAM pulls data directly from other systems of record, so there's no chance for typos or other data errors.

Oustanding experiences

A simple, smooth agreement experience will make a positive impression on customers and partners.

Improved visibility

Admins can grant access permissions to any stakeholder in the agreement process so no one is left wondering which steps have been completed and what's next.

Better findability

With a single central repository for all completed agreements, there are no more questions about where an agreement is stored or time spent unsuccessfully looking for a document.

Faster revenue

Money today is more valuable than money tomorrow. Faster contracts mean less revenue slips to the next month or quarter.

Actionable insights

Analyse agreement data with AI-powered search and charts that will uncover opportunities to reduce costs or negotiate more profitable terms.

Which tools are included in Docusign IAM?

IAM starts with the same eSignature you already know and love. It adds new tools that bring the same level of simplicity to work before and after a signature is collected.

Here's a closer look at what each tool does:

App Center

Connect common business technologies to Docusign so the systems can share data. By integrating Docusign with tools from Salesforce, Google, Microsoft, and more, your team will eliminate manual data transfers and avoid switching tools to complete agreement work.

Maestro

Build a step-by-step process to standardise the way agreements are created, signed, and managed. For each step, simply specify which people need to be involved, which technologies will be used, and which actions need to be completed. After each step is done, Maestro automatically kicks off the next one. It's an easy way to eliminate wasted time between activities and increase visibility around status and ownership. If your team uses a different set of steps for different types of agreements, create as many workflows as you need. The best part is that it doesn't require any code.

eSignature

Provide legal signatures from anywhere with an internet connection, using almost any device.

Navigator

Store your completed agreements in our intelligent repository. Navigator turns long pages of text into organised collections of structured data so your team can answer questions about contracts faster. You can filter or sort your entire agreement library by party, expiration date, dollar amount, contract type, or other useful characteristics. If you're looking for contracts that contain certain language, you can even use AI to search for specific keywords or broad concepts. Navigator will dramatically reduce the time your team spends digging through agreements to find answers.

Here's how the Docusign IAM tools work together to create an end-to-end agreement platform:



App Center	Maestro	eSignature	Navigator
Connect Docusign to different technologies in your agreement process	Standardise the steps to create agreements, detailing the people and technologies involved	Commit to final agreement terms	Find completed agreements, track analytics about the terms, and initiate renewals

How customers use Docusign IAM

Since agreements impact so many people and processes, there are countless ways that IAM can transform an organisation. The best way to understand the impact of Docusign IAM is to let the people who use it every day explain the benefits in their own words.

"The integration of Docusign into our workflows has been transformative for the rapid growth of our team. Docusign's transition to Intelligent Agreement Management (IAM) will help us streamline operations and significantly reduce the time and risks associated with traditional agreement processes. Ultimately, Docusign helps ease administrative hurdles so we can focus on innovating and bringing even more value to our community around the world."

Head of APJ & China, Sales and Success
Canva

"Leveraging Docusign IAM enables us to streamline our contract processes, allowing for rapid scaling and enhanced operational efficiency. By integrating AI-driven insights and automation, we can make data-driven decisions, optimise our service offerings, and reduce administrative burdens. This approach enhances our client and candidate experiences, fostering stronger relationships and higher satisfaction. Ultimately, adopting Docusign IAM will drive our growth and solidify our position as a leader in the global tech talent market, empowering continuous innovation and expansion".

Chief Financial Officer
Adeva

After feeling comfortable with Docusign's user-friendliness and value from the e-signature product, our organisation started using Docusign IAM platform and I was impressed with how quickly we were able to put it into use. Within a few days, we started using Docusign as our organisation's signed documents repository. The platform did all the work extracting data that we used to manually log and store. We no longer have to spend time hunting for documents through emails, paper records, or network folders."

Chief Financial Officer
Welia Health

Escape the Agreement Trap with Docusign IAM

IAM is the newest innovation from Docusign, the company that brought you the world's #1 e-signature solution. No matter which team you work on or what kinds of agreements your team manages, there's an IAM application that can save you time and money.

IAM Core

Built for organisations and industries of all sizes. Save time and get the most value from every agreement.

IAM for Sales

Streamline sales contracting, enabling sellers to create optimal deals more independently, close them faster, and extract more value.

IAM for Customer Experience

Transform time-consuming processes into engaging experiences that nurture life-long customer relationships and drive scale.

Read more about **Docusign IAM** to see how your team can benefit from centralising and connecting your agreement work on a digital platform.

If you'd rather talk to someone about how your team can use IAM, **book time with one of our experts**.

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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