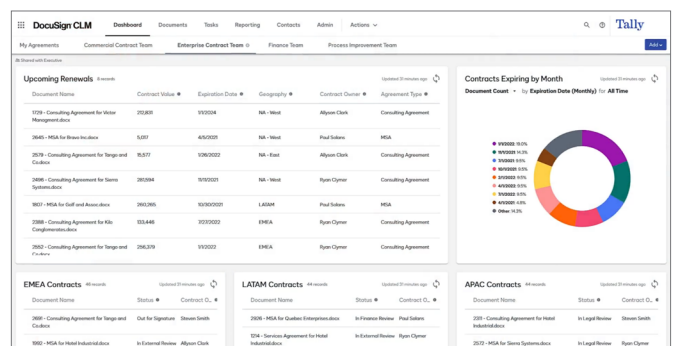


# Automate the Entire Contract Lifecycle with DocuSign CLM

Scale your digital contract processes to fit each team at your company

As companies mature, the volume and complexity of sales, procurement and legal contracts increase dramatically. While e-signature is a great first step, using email, spreadsheets and manual processes to generate, review, store and manage contracts isn't sustainable. It wastes time, creates risk and impacts revenue. To keep business moving and get ahead of competition, a digital end-to-end contract process must be a priority.



## DocuSign CLM

DocuSign CLM (Contract Lifecycle Management) allows you to streamline the contract lifecycle by automating manual tasks, orchestrating complex workflows and reducing unnecessary risk. It provides document generation, collaboration, workflow, a native integration with DocuSign eSignature and a searchable repository for completed agreements. This functionality is available in CLM as well as core business systems like Salesforce, Workday, SAP and more through best-in-class pre-built integrations. By enabling automation across the entire agreement process, you can do business faster, simplify compliance, and improve the employee and customer experience.

## Document generation

### Automated generation

Insert data from an input form or systems of record like Salesforce to populate each legally approved template with custom details. The contract is generated in seconds, with no hassles.

### Advanced formatting

Get every detail perfect with dynamic tables, currency conversion, conditional logic to show/hide fields, and full customization for a professional contract every time.

### Clause Library

Your legal team can define a library of pre-approved clauses and fallback options for non-legal users to leverage during negotiation.

## Be confident with the leader in contract management

### Industry leader

A Leader in the Gartner MQ for CLM and the Forrester Wave for CLM

### Fast time to value

Experienced experts use best practices to get you up and running successfully and efficiently

### AI that works

Real, field tested analytics that work with CLM to understand your contracts better

### Complete Agreement Cloud

A full suite of solutions to automate the entire contract lifecycle

### Built for scale

A highly available, secure infrastructure supports massive scale at many of the largest companies in the world



## Collaboration

### External review with version comparison

Easily send contracts by email to the counterparty for review and approval with the ability to quickly compare changes over time.

### Comments and tasks with history

Use comments and tasks to collaborate with internal stakeholders more easily in one place and accelerate time to approval. The history includes a full audit trail with the context of why changes were made.

### Slack integration

Collaborate in real time with contacts and stay informed about tasks and pending actions in Slack.

## Workflows

### Workflow steps

Easily add and configure over 100 pre-built steps using a drag-and-drop editor to build the right standardized process for your contracts.

### Conditional routing

Configure workflows that execute differently based on defined rules for ultimate flexibility and automation.

### Workflow actions

Automatically trigger actions that notify users when they are required to participate or automatically move forward for fast execution.

## Management

### Central storage

Store contracts in a central, searchable location to establish a single source of truth for your legal department and set granular access permissions.

### Dashboards and reports

Use standard and custom reports to uncover insights and monitor your contract process. Visualize each report with chart-based dashboards to track key KPIs.

### CLM 360

Use rich, discoverable metadata including custom attributes across all of your agreements and parties. Track renewals, report on obligations, view agreement hierarchies and identify total contract values.

### AI extraction

Use AI to automatically identify common attributes from contracts (e.g., effective date) and set metadata tags for improved analysis and organization without the hassle.

**“There’s no need for Legal to be directly involved in up to 90% of sales deals. DocuSign CLM gives us a way to automate the approval of repeat processes, only bringing in Legal where needed.”**

**Ahmed Badr**  
General Counsel  
GoCardless

**“With DocuSign CLM, the speed of turning agreements around has gone from multiple days to a couple of hours or less.”**

**Nicki Brock**  
Director of Enterprise Applications  
KORE

**“Rolling CLM out in three months for hundreds of account executives was no small task, but we got it done. We came in under budget and comfortably hit our target.”**

**Sonu Nayar**  
Director of IT, HR and legal applications  
Genesys

## Admin & Integration

### Full administrative control

Manage users, settings and more at the most granular and custom level from a fully featured administration console.

### Leading security and uptime

The highest level of global information security assurance available today (ISO 27001) and leading uptime so it's secure and available when you need it.

### Rich integrations

Prebuilt connectors and rich APIs enable key contract tasks to happen within third-party business applications like Salesforce, SAP Ariba and Workday.

### Native eSignature Integration

Get the native experience and functionality of the most robust e-signature solution on the market (sold separately).

## Services

### Extensive expertise

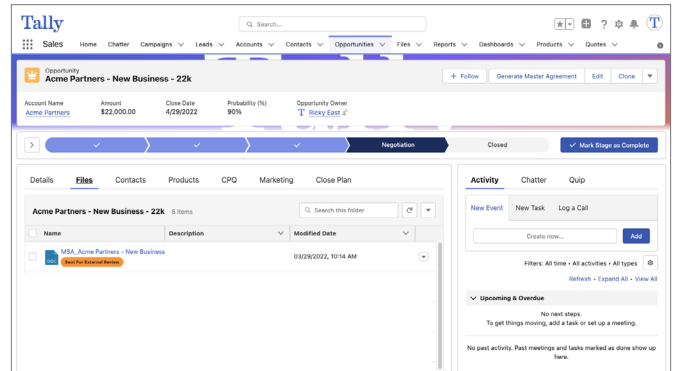
DocuSign has the largest customer success organization of agreement experts globally and an ecosystem of systems integrator partners to support you.

### Purpose-built implementation

Experience hands-on help from our experts to get up and running quickly and ensure both administrators and users have the knowledge and skills needed to succeed.

### Phased deployment

Establish the foundation for your Agreement Cloud solution and realize value quickly to extend your solution and deepen automation to truly transform your business.



Salesforce integration

## Sample use cases

### Sales

- Master Service Agreements
- Order forms
- Sales contracts
- Distribution agreements
- Special deal terms

### Legal

- NDAs
- Regulatory or government filings
- Contract compliance audits
- Partner agreements

### Procurement

- Supplier agreements
- Vendor contracts
- Purchase requisitions
- Statements of work

### HR

- Offer letters
- I-9 forms
- Compensation agreements
- Performance management

### Finance

- Client onboarding
- Account opening
- Asset transfer
- Claims settlement

### Many more

- Franchise agreements
- Statements of work
- Commercial sale & lease agreements
- Subcontractor agreements
- Major gift agreements
- Tech transfer agreements

### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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