

Getting Started with DocuSign CLM Essentials

Build the foundation for your CLM transformation with speed and confidence

Unlock value and transform how you do business with pre-configured and purpose-built implementation services designed to help you accelerate your time to value. With our Getting Started with DocuSign CLM Essentials services engagement, we will focus on:

- Preconfigured processes
- Prescriptive training
- Proven methodology

Services engagement scope

As part of this services engagement, DocuSign's Professional Services team will perform the following activities:

Initiation, design & discovery	Deliver pre-implementation checklist and onboarding engagement to ensure customer readiness as well as facilitate project kickoff with the delivery team.
Build & configure	Configure solution inclusive of migration ¹ of up to 50K documents, agreement template building, deploy configured workflow, reviews and sign-off.
Agreement routing & generation	Configure one workflow to generate and route up to four (4) agreements (with up to 15 merge fields), including internal reviewer approval and counterparty signature with DocuSign eSignature.
Testing & deployment	Provide testing guidance to test and validate your configuration in a sandbox environment and assist the DocuSign Administrator to deploy the solution to production.
Training & enablement	Deliver training from DocuSign University including self-paced courses for both End Users and Administrators to build foundational CLM Essentials knowledge and expertise.
Optimization & growth	Provide post-onboarding engagement, best practices, resources and expertise to drive adoption and help you realize more value over time.

We are the Agreement Experts

DocuSign's Customer Success team provides comprehensive solutions and success capabilities including professional services, adoption and enablement programs, and support plans to help you accelerate time to value and outcomes for your business. Our Agreement Experts are with you every step of the way to help you get started, drive adoption across your organization, optimize your solution and discover new opportunities with the DocuSign Agreement Cloud.

For more information, contact your account team or apac@docusign.com

Services at a glance

Best for

Customers implementing CLM Essentials for the first time

Anticipated Time to Live

Six to nine weeks²

Products covered

DocuSign CLM Essentials

Available use cases

Sales
Legal review

Supported agreement types include

Master Service Agreements (MSA)
Sales Agreements
Non-Disclosure Agreements (NDA)

¹ If document migration is needed

² Project timeline dependent on customer readiness; Project timeline to be mutually agreed upon with customer

Note: See the supported agreement types for more details.