DocuSign®

Adoption Consulting

Deploy faster with guided onboarding expertise from DocuSign Adoption Consultants.

We guide, you build

Adoption Consulting is designed to accelerate your onboarding goals by leveraging our expertise with having successfully guided thousands of organizations as they deploy DocuSign.

Your adoption consultant is with you at every step, providing industry-specific knowledge and product expertise enabling you to accelerate time to value and ensure a successful deployment. You will benefit from our proven approach that includes product configuration best practices, optimal deployment strategies and adoption resources aligned to your needs.

Functional focus areas:

– Admin console setup

– DocuSign template best practices

– Configuration review of up to three eSignature Web App use cases (within one department) or a single out-of-the-box (OOTB) connector use case

Expert-led sessions

Tap into the full potential of the platform with five to eight expert-led guided sessions that provide you with industry expertise and product basics. After onboarding, you'll be equipped with the knowledge and skills to handle your deployment and maximize results.

Deployment readiness

Work directly with a consultant to get onboarded quickly, identify enablement resources and deploy a solution fast. Through 1:1 consultations and go-live readiness, you'll be able to immediately deliver impact back to the business.

Best for
Admins
Power Users

Activities
Expert-led sessions (5-8 calls)
Self-paced courses
Configuration review
Deployment readiness

Outcomes
Proper configuration
Successful deployment
Faster time to value
Increase adoption

Products covered
DocuSign eSignature
DocuSign Click
DocuSign ID Verification
DocuSign Gen for Salesforce
DocuSign Negotiate for Salesforce
DocuSign Rooms for Real Estate

Proven onboarding approach

Led by an adoption consultant, our team will guide you through the onboarding experience and directly engage with you through virtual consultations to help you launch your first few use cases. You'll take the lead with the deployment and DocuSign will support you at every step to ensure go-live readiness and successful outcomes.

	Project Kickoff	Onboarding	Test/Build	Handoff
DocuSign will…	Understand your priorities Review the key milestones and timeline Provide learning materials	Review Admin best practices Review template configuration best practices Provide change management support and guidance	Review your configuration and template progress Provide guidance on standard DocuSign connectors Troubleshoot any issues	Ensure all project objectives are complete Provide end-user training resources Share guidance on post-launch support and learning
Enabling you to…	Take self-paced learning courses Align internal resources and materials	Begin configuring your eSignature solution Build your first three DocuSign templates Prepare for rollout	Integrate DocuSign with your existing system(s) Validate your end-to-end eSignature process setup Make any final configuration adjustments	Launch Agreement Cloud solutions with confidence Train end users Engage with our teams and enablement resources to support your journey

Assumptions and exclusions:

– Engagement must be completed within **90 days** of when package is sold.

– Consultations with the customer are conducted remotely and require responsiveness in order to achieve the optimal target completion dates.

– Engagement includes guidance up to three use cases (limited to a single department).

– Adoption Consulting includes guidance on up to **three** eSignature Web App use cases or a **single** standard DocuSign OOTB connector over **five to eight** consultations.

– Guidance during the build and testing phase can be provided in a sandbox environment.

– End user training, troubleshooting or ad hoc support are not provided.

– Custom scripts, OOTB connectors (DocuSign for Salesforce, NetSuite, Dynamics and Sharepoint Online) and Salesforce custom buttons, APIs, SharePoint On-prem, custom integrations and configuration of 3rd party products are not included as part of this engagement.

We are the Agreement Experts

Customer Success provides comprehensive advisory, implementation and adoption capabilities 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 you started, drive adoption across your organization, optimize your solution and discover new opportunities with the DocuSign Agreement Cloud.

For more information on how to engage with Customer Success, reach out to your account team or sales@docusign.com.