

# DocuSign: Achieving Digital Transformation with Seal

## 01 - INTRODUCTION

As the global leader in eSignature and Digital Transaction Management (DTM), DocuSign, Inc. (DocuSign®) is changing how business gets done by empowering anyone to transact anytime, anywhere, on any device with trust and confidence. DocuSign enables individuals and organizations of every size, industry and geography to make every decision, approval, workflow and signature fully digital.

DocuSign is a fast-growing business based in San Francisco with a global trust network of more than 225,000 companies and more than 85 million users in 188 countries. On average, DocuSign users complete 950,000 transactions per day, keeping life and business moving forward.

DocuSign helps organizations achieve digital transformation. Like its customers, DocuSign's own transformation required leadership in technology, culture and processes to eliminate printing, faxing, scanning and overnighting paper documents within their business. DocuSign's Legal team helped to lead the transformation and model the way.

## 02 - THE CHALLENGE

According to Scott Trainor, VP, Deputy General Counsel, "The legal team routinely gets requests from across the business for support with contracts – whether to finalize new agreements with customers, partners, suppliers and investors, or to understand existing contract terms. Prior to driving towards a fully digital business, those contracts could be hard to locate for quick and easy review."

DocuSign was founded in 2003 and has since grown to more than 1,700 employees in 13 offices around the world. The company has thirteen years of contract history. "In the early days when policy, procedure and process were less defined, most anyone in the company could have a fully executed version of any given contract," added Trainor. "The contracts weren't always provided to or easily accessible by the legal team."

The procurement team faced a different challenge where in high spend areas, they're frequently asked to pull contracts with upcoming termination dates. Without proper tools, it was a highly manual and time-consuming exercise.

In 2015, the company launched a cross-functional team to improve contract processing, visibility and access. This included the exploration and review of software solutions that would serve as a searchable repository of all DocuSign contracts while providing secure, role-based access to contracts given the sensitive nature of the information they contain. In addition, it would meet standard considerations that DocuSign uses to assess enterprise application, e.g., user-experience, ease of implementation, security, availability and other considerations. Finally, the solution would need to meet budget, time, and internal IT resource constraints.

Initial exploration led the team to Contract Lifecycle Management (CLM) solutions. However, they quickly realized that even if they implemented a CLM solution, they would still need to tackle the problem of migrating contracts from multiple repositories into the CLM system. The sheer number of contracts, approximately 25,000, would make this a daunting task. Even if all existing contracts were to be migrated into the CLM, extracting metadata on those contracts would be an even more daunting task.

### 03 – THE SOLUTION

DocuSign invested in Seal Software alongside Apttus, DocuSign's chosen CLM system. Seal Software would help discover and migrate contracts into the CLM system and analyze contracts beyond available metadata. While the initial setup involved the IT team, regular users of Seal's system comprise about half a dozen users on the company's Legal team.

Seal Software's solution is easy to use, with many common searches built-in and straightforward, easy-to-use tools for designing new searches. Seal also has out-of-the-box integrations with multiple CLM solutions, including Apttus. Trainor noted that "The Seal implementation helped us identify and corral contracts from a number of systems across the company quickly and easily."

Seal's compliance and security standards align with DocuSign's stringent criteria. Seal went through a rigorous security assessment involving architecture review and security review committee approval.

Beyond the solution itself, one important factor in DocuSign's decision was the fact that Seal had been successfully deployed at several leading San Francisco Bay area SaaS companies that DocuSign benchmarks against. These companies shared concrete examples of handling client requests before and after Seal, and this increased DocuSign team's confidence in the positive ROI of the Seal solution.

Additionally, the organization has been able to define its process to synchronize Seal's discovery and analytics with its Contract Lifecycle Management (CLM) system which is part of the second phase of their process improvement initiative.

### 03 – THE SOLUTION

Implementation of the Seal system took about 8 weeks and required 3-4 hours/week of DocuSign time. Primary DocuSign resources involved in the first half of implementation were an IT program manager and a systems engineer, whereas the second half of implementation required participation from the Legal team.

Ultimately, DocuSign was able to migrate all their contracts into their CLM system. According to Trainor, "Seal gives DocuSign the ability to be extremely responsive to our stakeholders and to be judicious with our Legal resources. I have been part of many legal teams and manual contract search is a top driver of team and client dissatisfaction. With Seal we have eliminated nearly all manual searches, which makes my team and me much more efficient while increasing team morale. Bottom line, **Seal helps us do our jobs better, faster and more efficiently.**"

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