Intelligent Agreement Management (IAM) for Growing Businesses

eBook

As your business grows, refining how you turn verbal agreements into signed contracts becomes even more important. If you're still using manual tools, the complicated steps to create and finalize contracts often lead to deal delays - causing potential customers to drop out right before signing. Additionally, finding terms and data in old agreements can take a lot of time and effort, making it hard to manage repeat business and renewals.

It is important to introduce automation and standardization into agreement workflows early so you can do more with less. We developed Docusign Intelligent Agreement Management (IAM) to help free up time to focus on what truly matters—growing your business.

We know it can be challenging for growing businesses to manage an increase in agreements without additional resources. In this eBook, we will answer your most popular questions about IAM, including:

1. What is Intelligent Agreement Management (IAM)?

2. How do you know if you need IAM?

3. What are the benefits of IAM and what exactly is included?

What is IAM?

Intelligent Agreement Management (IAM)/inˈteləj(ə)nt/ /əˈgrēm(ə)nt/ /ˈmanijmənt/Docusign

IAM starts with the same e-signature solution you may be familiar with as an easy way to sign agreements. It adds new tools that simplify the additional steps before and after a signature is collected.

Built on the world's leading e-signature platform trusted by 1.6 million customers, IAM harnesses the power of AI and automation to streamline your entire agreement lifecycle. Accelerate deals, reduce errors, unlock important insights, and keep it all secure with industry-leading security measures. Go beyond the signature and take your agreement processes to the next level.

In short, Intelligent Agreement Management (IAM) is a single platform built specifically to handle the work involved in the end-to-end agreement process.

IAM also connects to your favorite everyday applications, so you can work in the tools you are familiar with and avoid retyping the same info from a completed agreement back into the systems needed to act on that agreement. All stakeholders can use IAM to check the status of a document, so visibility is instantly improved. Since agreements are created within IAM, they can never go missing.

"After feeling comfortable with Docusign's user-friendliness and value from the e-signature product, our organization started using the 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 organization'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

How do you know if your organization needs IAM?

The best way to determine whether you need IAM is to audit your current technologies and processes. Here's how to do it in three simple steps:

1. Make a list of your current technologies and processes.
2. As you go, note which steps are manual and which are automated.
3. Add up how much time is spent waiting for routine handoffs.

Bonus step: Ask your 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 finalize 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 and/or notarization 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 analyze contract data

A recent study by Deloitte and Docusign discovered:

- **62%** of professionals struggle to locate existing contracts
- **45%** manually input data into contracts rather than importing from other systems
- **52%** wait too long for identity and notary verification
- **54%** lack the tools to automate agreement tracking and analytics

Benefits of IAM for growing businesses

IAM brings a series of improvements at all three stages of the agreement workflow: creating, committing to, and managing agreements. Here's how:

Maestro helped us streamline our processes, reduce bottlenecks, and speed up customer response times. … We're able to create intuitive and transparent experiences for our customers, so they can get the information they need faster, easier, and seamlessly."

Systems Integration Lead
OnTrack 401(k)

Create	Commit	Manage
Increased efficiency	**Outstanding experiences**	**Better findability**
By replacing manual work with automation, IAM helps you complete agreements faster with fewer resources.	A simple, digital agreement experience will make a positive impression on customers and partners.	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.
More consistent agreement language	**Improved visibility**	**Faster time to close**
By preapproving templates, legal teams can minimize risk and accelerate internal review.	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.	Faster contracts mean less revenue slips to the next month or quarter.
Enhanced productivity		**Actionable insights**
Employees can let technology handle time-consuming administrative tasks, allowing them to spend more time on high-value strategic work.		Analyze agreement data with AI-powered search and charts that will uncover opportunities to reduce costs or negotiate more profitable terms.
Fewer errors		
IAM pulls data directly from other systems of record, minimizing typos or other data errors		

Docusign IAM Core

Companies with disconnected agreement management workflows spend 18% more time working on agreements. (Source: Deloitte and Docusign, Unlocking the Value of Agreement Management)
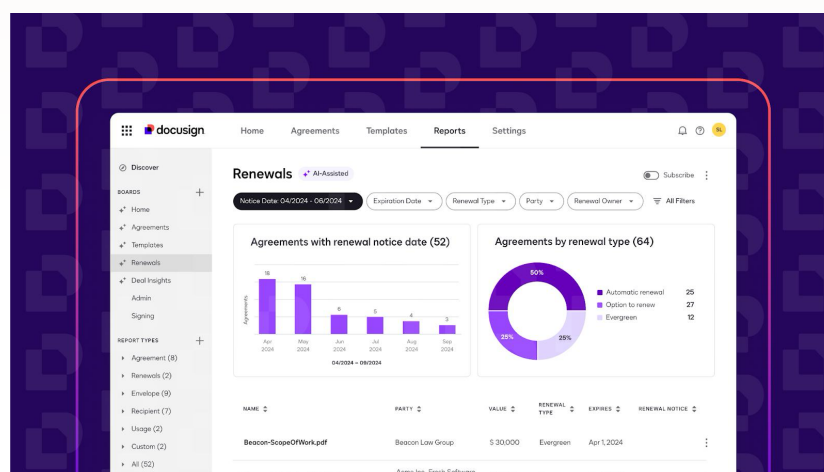
IAM Core connects all systems to speed up workflows and boost revenue - starting with the same eSignature that revolutionized digital agreements worldwide. Enjoy new tools that bring the same level of simplicity to work before and after a signature is collected.

Docusign

eSignature

Docusign IAM transforms your end-to-end agreement processes. Docusign's industry-leading security measures protect your sensitive information throughout the entire agreement process.

IAM Standard and Professional plans include unlimited sends. Unleash your business's full potential with unlimited web app sends that enable you to break free from the limits of traditional tools.
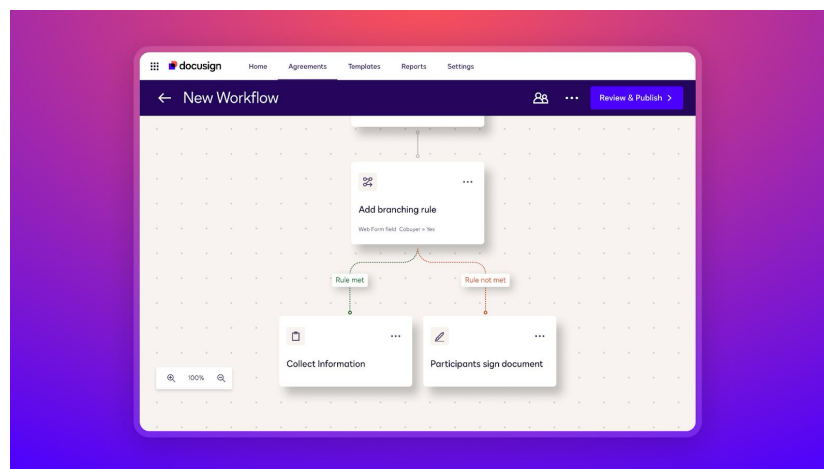
Navigator

Don't just store your contracts—put them to work. Our AI analyzes your agreements, identifies critical information like upcoming renewals and payment terms, and helps you stay ahead of the game.

Maestro

Reclaim your time with no-code workflows that streamline your end-to-end agreement processes, freeing you to focus on strategic initiatives.

Supercharge your productivity. Docusign connects with your essential business apps to automate your entire agreement workflow—from legal document archiving to sales deal management and financial record keeping—so you can achieve more, with less effort.

App Center	Maestro	eSignature	Navigator
Connect Docusign to different technologies in your agreement process	Standardize the steps in your agreement process, including the people and technologies at each	Commit to final agreement terms	Locate completed documents to answer questions about the terms and track data

"When we're able to leverage Maestro to provide our customers with convenient, hassle-free experiences, they will tell their friends and family and that leads to more business for us."

Manager/Digital Transaction Systems Admin
Coldwell Banker Prime Properties

Getting started with Docusign IAM

With IAM Core, get valuable time back to focus on what truly matters – growing your business. There are two options to choose from to get started with IAM Core.

IAM Standard

For small teams looking to manage agreement workflows, IAM Standard uses simple automation, AI, and a smart repository to improve productivity and lower risk. Plus get unlimited envelope sends to help you scale.

IAM Professional

For larger teams looking to eliminate manual tasks and streamline the entire agreement process, IAM Professional includes forms and advanced automation to manage end-to-end agreement workflows, with a smart repository and AI to drive smarter negotiations.

Read more about Docusign IAM to see how your team can benefit from centralizing and connecting your agreement work on a digital platform. Ready to purchase? Browse our flexible IAM packages.

If you'd rather talk to someone directly to understand how your team can benefit from IAM, book time with one of our experts.

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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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