docusign™

Guide to Intelligent Agreement Management

Intelligent Agreement Management (IAM)

A single, trusted platform, powered by Docusign Iris, our agreement AI engine, that unifies and automates the end-to-end agreement process. The IAM platform integrates directly with the tools you use today, enabling faster decisions, more accurate data, and a single, trusted source of truth for every agreement.

Agreements are a part of nearly every business process within an organization. Every team has a process for creating, committing to, and managing business agreements. Many teams know Docusign for our eSignature solution, which is trusted by nearly 1.8 million customers and used by more than a billion people to accelerate the signature step of the agreement process.

Our deep experience in e-signature has given us a unique perspective on the overall agreement process: It's rarely the signature that slows business down. The real friction—and risk—happens before and after the signature, where manual steps, fragmented processes, and disconnected systems increase risk and delay outcomes.

Inefficient agreement processes have a significant impact on business value. Some examples include:

- Delayed revenue when deals stall
- Onboarding friction that leads to customer drop-off
- Missed supplier incentives and auto renewals
- Teams bogged down by repetitive, low-value work

In this eBook, we'll cover key information to help you understand how Docusign IAM can benefit your organization:

- How to know whether you need it
- How are organizations like yours using it?
- What are the benefits?
- How does it work?

How to know whether you need Docusign IAM

When you think about your agreement management process, what adjectives come to mind? Convoluted? Disjointed? Painstakingly slow?

Wondering if IAM can improve your agreement process? If these answers sound familiar, you may have an opportunity to see immediate value by moving to Docusign IAM.

Take our **maturity assessment** for a more thorough review of your current process.

How do you create agreements?

- We create agreements manually—either from scratch or by modifying existing documents in Microsoft Word or Google Docs.
- To customize an agreement, we have to manually enter details, such as the customer's name.

How do you route agreements for review and approval?

- We route via email to stakeholders when it's their turn for review.
- It's difficult to identify and track potential risks or non-standard clauses.

How do you collect signatures?

- It's challenging to track the status of agreements, including who has viewed or signed them.
- We lack automated reminders for signatures pending, which can lead to delays.

Where are agreements stored?

- We do not have a single centralized, searchable repository for all executed agreements.
- It's difficult to search for specific clauses, terms, or dates within agreements.

How do teams analyze agreements?

- It's difficult to track key contract dates, such as renewal, expiration, and payment due dates.
- We sometimes miss out on opportunities (e.g., canceling auto-renewals or failing to collect penalties) because agreement details are hidden or misunderstood.

How are organizations using Docusign IAM?

Recent research found that sales leaders with more mature capabilities across every stage of the agreement lifecycle reported an average of

29% fewer

contracting-related deal delays from approval bottlenecks, prolonged reviews, and similar obstacles.

Deloitte

The agreement process touches every function across an organization, which means many teams and types of agreements can benefit from IAM. Here are the most common examples.

Sales agreement generation and management

Do your sellers struggle to figure out the right contract template to use in specific situations? Are they wasting time digging through shared folders and manually transferring data from the CRM to the contract? This can lead to errors in custom quotes and contracts, delays in revenue, and less time for building relationships with customers.

Docusign IAM for Sales helps sellers leverage AI to find prior contract details and create the right agreement from within their CRM, eliminating manual data entry and reducing errors. Instead of digging around to prepare for the next deal, sellers can enjoy faster reviews and signatures. The platform also makes it easy to build workflows that automate routing and expedite reviews across stakeholders, keeping sellers' attention focused in one place.

"If it's the last two days of the month or quarter, and you need a non-disclosure or sales agreement, Docusign IAM is the difference between closing the deal then or moving it to the next sales period."

Carmen Warfield, Deputy Clerk to the San Miguel County Board
San Miguel County, Colorado

Legal requests, review, and redlining

Legal teams are often overwhelmed by an inbox full of requests, and they struggle to find the information necessary to prioritize their work. Docusign IAM helps automate contract intake while centralizing negotiation and collaboration.

Docusign Iris, the agreement AI engine that powers IAM, helps accelerate the negotiation process by allowing legal reviewers to compare agreements against legal playbooks with the click of a button. This automates the completion of contract templates and reduces manual errors and process bottlenecks, making legal teams more efficient and scalable.

"If we can click less and download less, we're saving time. Manual processes don't engage the mind here. If we can get rid of them with technology, it's better for everybody."

Brendan Mills, Contracts Administrator
Perceptyx

Legal search and storage

Many organizations struggle because their completed agreements are scattered across disparate systems, such as email, shared drives, and local storage, which makes them difficult to find and manage. Even if they are stored centrally, it can be time-consuming to locate a contract or a group of contracts to understand the terms within them.

Docusign IAM centralizes every executed agreement into a single, trusted system of record, while also transforming unstructured contracts into searchable, structured data. Legal teams can instantly find any agreement, clause, or obligation—eliminating manual search time, reducing compliance risk, and increasing confidence in every decision. With complete visibility and AI-driven insights, legal becomes a faster, more precise, and more proactive business partner.

"I save so much time... All our files are on one platform, and I'm no longer the keeper of it all. Anybody can go in and find a document as easily as I can."

Carmen Warfield, Deputy Clerk to the San Miguel County Board
San Miguel County, Colorado

99% less time

to locate agreements

San Miguel County, Colorado

Procurement vendor agreement management

Missed renewal windows lead to unwanted auto-renewals or lost revenue. Overlooked payment terms can result in penalties. A forgotten termination deadline locks a company into an unneeded service for another costly term. Without a central contract repository to quickly find and track obligations, businesses can miss out on significant savings.

Docusign IAM makes it easier to extract and track critical supplier contract data, such as renewal dates, payment terms, and SLAs.

Instead of searching through contracts for key terms, Docusign Iris automatically finds and highlights key contract obligations—such as renewal, payment, and termination dates—so you don't miss important deadlines. Rules-based notifications and reporting keep you ahead of key milestones, while tracking unique obligations and assigning fulfillment tasks keep your team accountable.

77% of leaders

in high-performing organizations credit agreement management with their success in core business areas.

Deloitte

"Navigator is helping my team quickly ID upcoming renewals—the reporting provides an easy-to-use and -filter user experience. Previously, the team relied partially on spreadsheets and internal task tracking tools; Navigator provides a far superior dashboard. As a leader, I like that because it lets me zoom out and look across the entire buy-side landscape and also zoom in to see a subset of renewals based on a variety of filterable fields."

Brian White, Senior Director of Procurement and Sourcing
Docusign

What are the benefits of Docusign IAM?

Docusign customer results

95%

reduction in contract turnaround time, so deals close faster and teams can serve customers sooner.

Refinitiv

75%

increase in operating efficiency.

Metro Credit Union

78%

of agreements do not require legal intervention.

iCIMS

Docusign IAM unifies the entire agreement process with an AI-powered platform that's connected, secure, and scalable so your teams can:

Create → Commit → Manage

Create agreements faster

Quickly generate custom agreements using advanced workflows and integrations with the tools you already use. Accelerate reviews, automate approvals, and shorten time-to-signature with AI-powered automation.

Commit with greater confidence

Docusign eSignature empowers your business to send, sign, and manage agreements from almost anywhere—securely, instantly, and effortlessly— now with online notarization and identity verification.

Manage for maximum business impact

Gain visibility after the agreement is executed, so you can easily track obligations, manage renewals, and surface key terms and insights through intuitive dashboards.

"Docusign Iris saved me thousands of dollars and hours of work, and I got the answer I needed to take the right business action."

Marla Crawford, General Counsel
Cimplifi

How does it work?

Docusign IAM packages include our industry-leading eSignature solution, with unlimited web app sends, plus these capabilities:

Accelerate revenue with intelligent automation

- App Center and integrations help you connect to the systems where you work today

- No-code workflows enable businesses to easily connect and automate agreement steps and workflows across business systems

- A collaborative hub leverages AI to streamline intake and accelerate reviews and approvals

Reduce risk with the most trusted agreement platform

- Automate and standardize agreement preparation using pre-approved templates

- Meet compliance needs with integrated identity verification and authentication solutions that ensure security while maintaining a user-friendly experience

Unlock hidden value with agreement intelligence

- An intelligent agreement repository that centralizes executed agreements and uses AI to help you quickly search and analyze them for powerful insights

Conclusion

All of this is part of the Docusign IAM platform, which meets the stringent security requirements of the most security-conscious organizations around the globe, including the world's largest financial institutions, the U.S. federal government, and more than 95% of Fortune 500 companies. Our platform is built on a trust-first approach, where customers opt in for AI training and all data is aggregated and anonymized, so you can rest assured that your business-critical agreements remain secure and confidential. In fact, Newsweek has ranked Docusign as the #1 most trustworthy U.S. software and telecommunications company for two years in a row.

No matter which team you work on or what kinds of agreements your team manages, there's an IAM application that can save you time and money.

Read more about **Docusign IAM** to see how your team can benefit from centralizing and connecting your agreement work on a digital platform.

If you'd rather talk to someone about how your team can use IAM, **book time with one of our experts**.

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