**DocuSign**®

# Guided Onboarding

Adoption Consulting Lite

## Deploy faster with guided onboarding expertise from DocuSign Adoption Consultants.

### We guide, you build

Adoption Consulting Lite 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 set up
- DocuSign template best practices
- Configuration review of a single DocuSign Web App use case (within one department)

### Expert-led sessions

Tap into the full potential of the platform with three to five 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 (3-5 calls)
Self-paced courses
Configuration review
Deployment readiness

### Outcomes
Proper configuration
Successful deployment
Faster time to value
Increase adoption

### Products covered
- DocuSign eSignature (Web App only)
- DocuSign Click
- DocuSign ID Verification

# 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 use case. You'll take the lead with the deployment and DocuSign will support you at every step to ensure go-live readiness and successful outcomes.

## DocuSign will...

| | Kick-off | → Onboard | → Build/Test | → Hand-off |
|---|---|---|---|---|
| | Understand your priorities | Review Admin best practices | Review your configuration and template progress | Ensure all project objectives are complete |
| | Review the key milestones and timeline | Review template configuration best practices | Guide you through testing your use case | Provide end user training resources |
| | Provide learning materials | Provide change management support and guidance | | Share guidance on post-launch support and learning |

## Enabling you to...

| | | | | |
|---|---|---|---|---|
| | Take self-paced learning courses | Begin configuring your solution | Integrate DocuSign with your existing system(s) | Launch Agreement Cloud solutions with confidence |
| | Align internal resources and materials | Build your first three DocuSign templates | Validate your end-to-end eSignature process setup | Train end users |
| | | Prepare for rollout | Make any final configuration adjustments | 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 on one use case (limited to a single department).
–   Adoption Consulting Lite includes guidance on **one** eSignature Web App use case (limited to a single department) over **three to five** 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, non-standard Salesforce instances and custom buttons, APIs, SharePoint On-prem, non-standard out-ot-the-box connectors, custom integrations or configuration of any 3rd party products.

# 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.