DocuSign®

Creating a Digital Center of Excellence

Our guide to implementing a Digital Center of Excellence on your company intranet to improve DocuSign enablement and adoption

Traditionally, a company intranet site was simply a place to share internal content and store static documents. Now, it has become an increasingly vital organizational tool for improving employee engagement, productivity and collaboration between employees and departments. This is especially true in today's dynamic work environment where people often work cross-functionally across different locations.

This paper explores the key benefits of creating a **DocuSign Digital Center of Excellence (COE)** for your team and recommends standard content for your project's site. The digital COE provides a project overview, objectives, success stories and how the users can contact you/your team. While a traditional Center of Excellence takes a more in-depth look at pillars such as communication, enablement and adoption, a digital COE is slightly less robust but allows companies to address immediate enablement needs, while leaving the door open for expansion into a full COE later within their roadmap.

Why use a Digital COE?

There are several benefits of having a DocuSign COE on your company intranet site:

Streamline business processes
Employees can use the digital COE to request a DocuSign account, a demonstration or user training.

Improve communications
Announce program news and updates such as new features or changes to company guidelines.

Increase knowledge
Use as a central document repository to cultivate in-house expertise and knowledge sharing. The digital COE also makes key documents accessible to all, such as standard operating procedures (SOP), frequently asked questions (FAQ), and training materials.

Increase visibility
Raise awareness of the program which is helpful when marketing DocuSign to other lines of business and departments. Leverage your company's enterprise social network (ESN) and/or communication tools (such as Slack or Salesforce Chatter) to promote adoption and visibility.

Foster collaboration
Break down information silos set by departmental or geographical boundaries.

Reduce costs
Minimize risks and costs associated with misinformation or miscommunication by acting as the single source of truth and avoid answering the same questions repeatedly.

Getting started

Before you initiate the process of setting up the digital COE, ensure you've communicated with the appropriate stakeholders such as your executive sponsor and/or other members of your digital COE team:

Identify the key stakeholders within your company
These are the key executives responsible for the return on the DocuSign investment. Ask these stakeholders to help provide sponsorship for the new portal.

Identify a contact to ensure content is on-brand for your company
DocuSign Adoption Kit for DocuSign branding and adoption content.

Identify key partners
Partners are power users of existing company portals or communities. Leverage their expertise to assist with:

– Best practices

– Spreading the word about the new digital COE and increasing the number of visitors

– Leveraging other resources like your company's ESN or community site(s)

Define the objectives of the portal

Think about the type of content you want to share and manage. Examples of objectives include:

– Communicate project goals

– Create awareness of project and project successes

– Highlight success stories

– Create dialogue between the project team and company employees

Define digital COE administration

– Identify admins for the digital COE to ensure the information is kept current. These admins would also be responsible for answering questions and coordinating with departments interested in implementing DocuSign.

– Agree on a cadence for new information and how to communicate it. New information examples include:

  · DocuSign product releases

  · New company/corporate policies for using DocuSign

  · Testimonials or success stories from customers and users

  · Recognition opportunities for new implementations or creative ways to utilize Agreement Cloud capabilities

  · DocuSign metrics and/or usage results—such as the number of users and number of completed envelopes to show how the program is being adopted across your organization

Essential content for the Digital Center of Excellence

When designing a DocuSign portal, the information must serve both new and existing customers. So, what resources should be included on your portal? The following list provides the recommended content:

Frequently asked questions (FAQ) document

The FAQs should answer product and organizational questions such as:

– What is the DocuSign Agreement Cloud?

– What is an electronic signature? Is it legal? Is it compliant with corporate policies?

– Who is using DocuSign today in our organization?

– Is there a chargeback to my cost center? Learn more about project Budgeting and Chargeback.

– Who can I contact to request more information?

– Can I use DocuSign on my mobile phone or tablet?

– How can I sign up for training or request a demo?

Message from the executive sponsor

A short video or a written message from your executive sponsor can go a long way in establishing credibility and legitimizing the program. The ideal executive sponsor is a recognizable influencer within your organization and is someone who supports the goal of digitally transforming how the company does business.

Use case intake form

A use case intake form is a great way to capture new requests from your DocuSign users in your organization and manage incoming requests.

Review Creating a Use Case Intake Process for more information and for a sample intake template to get you started.

About us & contact us

People need to know who to contact for more information. Provide a short statement about your business unit or role. Be sure to include clear instructions on how they should contact the responsible person/group for information or with requests.

If there are multiple points of contact for different topics such as support, use case review, account provisioning or training requests, provide details on the best method to connect.

Key documents and resources

Include documentation around training materials, company guidelines and terms & conditions. Additional DocuSign resource sites to include in this section:

– Support Center: Product tutorials, videos, articles, and helpful tips.

– Trust Center: Information on DocuSign's industry-leading global security standards and certification.

– Knowledge Market: A one-stop shop for tools and best practices for adoption. Requires a DocuSign account to log in.

– DocuSign University: Official end user training options and certifications. As an add bonus, your team can get a head start on your learning with the DocuSign University YouTube channel and embed these learnings for easy access for your team.

– DocuSign Community: Forum to ask questions and get answers from DocuSign Agreement Experts and other DocuSign customers around the globe.

Signing demo

Providing users an opportunity to sign a sample document is an excellent way for users to learn first-hand how easy it is to sign documents with DocuSign eSignature.

For a sample signing demonstration, leverage the DocuSign PowerForm feature to create your own and embed it as a link in the portal.

Events calendar

The calendar can include items such as "Lunch & Learn" opportunities, training schedule, upcoming "Use Case Discovery Workshops" and/or DocuSign's quarterly product release schedule.

Sample design

Below is a simple layout of the DocuSign digital COE intranet sites using the recommended content:
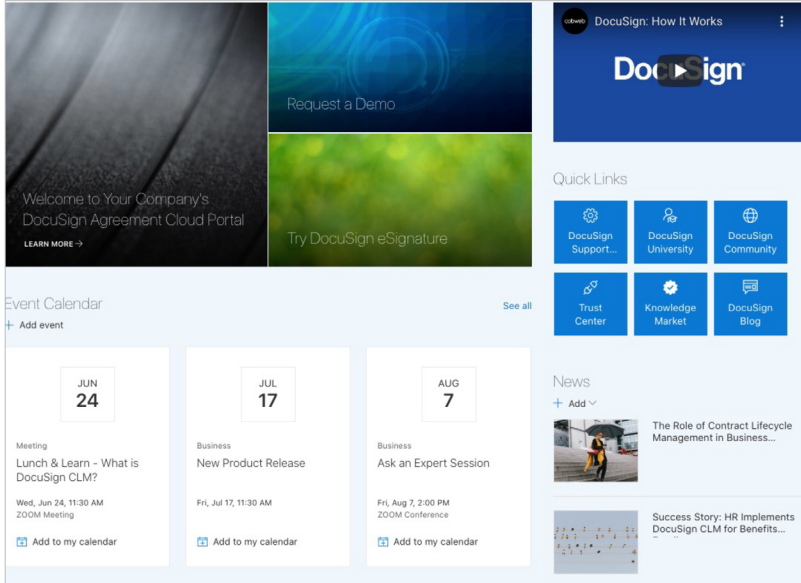

The digital COE above was created with SharePoint via Office 365. Many intranet tools like SharePoint, Zoho or HyperOffice have options available to create a portal to use as your digital COE.

Leveraging alternatives to a Digital COE

If you don't have the resources to create a digital COE or want to promote your project on other resources in addition to the intranet site, use the aforementioned tips to replicate a one-stop-shop for your project on your ESN and/or communication tools like Confluence, Yammer, Chatter, Microsoft Teams, Slack or a Smartsheet Dashboard. Many organizations provide multiple access points for internal users to find information on DocuSign, connect to the main site (portal), and communicate with the project group.
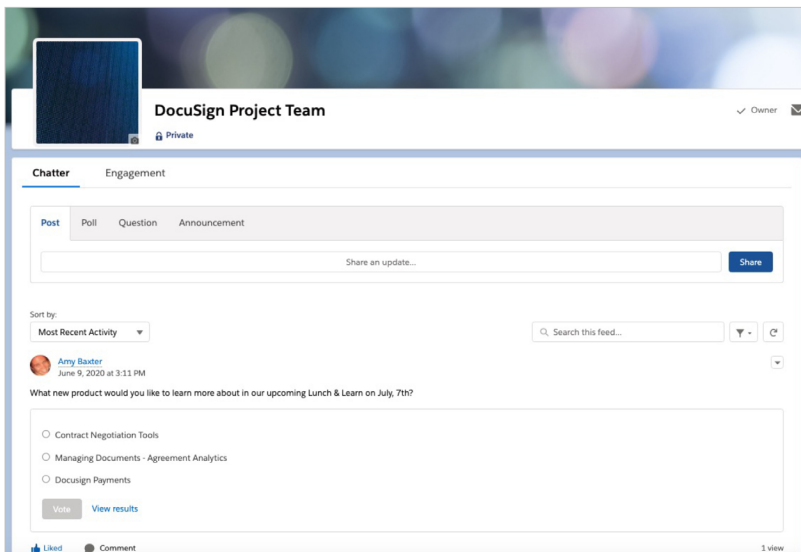
In addition to laying out the project team's objectives and contact information, the Chatter page can feature a poll so members can suggest upcoming event subjects. Chatter or a social media-like page is a great way for employees to interact, post questions and get information.
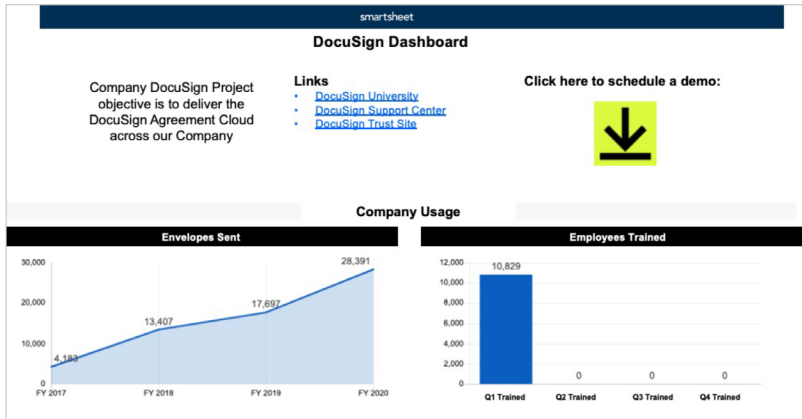
A Smartsheet Dashboard is another great way to provide information about your project, particularly with how easy it is to import project data to display in charts. High-level reporting makes it easy for you to quantify and display success measures.

Digital COE post-launch

After launching the digital COE and/or an ESN community, continue to communicate and stay actively involved with maintaining its value within your company; it should serve as the one point of truth for the DocuSign Agreement Cloud in your organization. Setting up a digital COE can be just the beginning of your DocuSign journey and after a successful launch, consider expanding your digital COE into a full-fledged COE as your usage expands.

– Post an announcement on the company main site that introduces the digital COE and the purpose it serves to the company. Include a direct link to the digital COE itself.

– Proactively search for existing business units that are willing to share their DocuSign success stories. Share the links to your digital COEand these stories on your company's main site to drive awareness.

– Maintain a regular cadence for posting new content whether it's weekly or monthly. It's recommended to update new information on the site at least once per month. A "tip of the month" is a great way to keep the site fresh and updated if there are lulls between implementation and product update communications.

– Reach out to new use case owners to see if they would like to provide a testimonial/success story.

– Host regular Q&A sessions on the group page with key stakeholders from your company.

– Post product release information on the group page. Check out or link directly to the DocuSign Release Notes page.

– Post key articles from the DocuSign Blog page. When posting, make sure the article is relevant to your industry/company's objectives.

– Encourage users to post questions. If you don't have questions after launch, post a frequently asked question and address it to help promote interaction.

– Announce when your team is conducting product demos and provide meeting login information.

Summary

Hosting a DocuSign digital COE on your intranet not only increases program visibility but also improves employee interaction while reducing costs. Most importantly, the digital COE provides self-service and 24/7 availability allowing your organization to access the information they need, when they need it.

The DocuSign Agreement Cloud

The DocuSign Agreement Cloud™ helps organizations automate and connect the entire agreement process.

As with other aspects of digital transformation, modernizing an organization's system of agreement is about digitizing, connecting, and automating the relevant processes. The DocuSign Agreement Cloud is purpose-built for this, allowing organizations to do business faster with less risk, lower costs, and better experiences for customers, partners and employees. Processes that took days now take hours or minutes.

The DocuSign Agreement Cloud™ consists of 350+ pre-built integrations with popular business apps. In addition, our API enables embedding and connecting DocuSign with customers' websites, mobile apps, and customer workflows. All told, today this enables more than 1 Million customers and hundreds of millions of users to measure turnaround time in minutes rather than in days, substantially reduce costs, and largely eliminate errors.