

# Revolutionize Agreement Workflows:

## Low-code Automation with Docusign and Power Platform

# Safe Harbor Forward Looking Statements

This presentation, meeting, website, and similar communication, including through social media outlets, may contain forward-looking statements within the meaning of Section 27A of the Securities Act of 1933, as amended, and Section 21E of the Securities Exchange Act of 1934, as amended, which statements involve substantial risk and uncertainties. All statements other than statements of historical fact, including statements regarding our future operating results and financial position, our business strategy and plans, market growth and trends, our anticipated future products and product strategy, objectives for future operations, and the impact of such assumptions on our financial condition and results of operations are forward-looking statements. Forward-looking statements generally relate to future events or our future financial or operating performance. In some cases, you can identify forward-looking statements because they contain words such as "may," "will," "should," "expects," "plans," "anticipates," "could," "intends," "target," "projects," "contemplates," "believes," "estimates," "predicts," "potential," or "continue" or the negative of these words or other similar terms or expressions that concern our expectations, strategy, plans or intentions.

Forward-looking statements include, but are not limited to, statements about: our expectations regarding global macro-economic conditions, including the effects of inflation, volatile interest rates, instability in the global banking sector, and market volatility on the global economy; our ability to estimate the size and growth of our total addressable market; our ability to compete effectively in an evolving and competitive market; the impact of any data breaches, cyberattacks or other malicious activity on our technology systems; our ability to effectively sustain and manage our growth and future expenses and achieve and maintain future profitability; our ability to attract new customers and maintain and expand our existing customer base; our ability to effectively implement and execute our restructuring plans; our ability to scale and update our platform to respond to customers' needs and rapid technological change, including our ability to successfully incorporate generative artificial intelligence into our existing and future products; our ability to expand use cases within existing customers and vertical solutions; our ability to expand our operations and increase adoption of our platform internationally; our ability to strengthen and foster our relationships with developers; our ability to retain our direct sales force, customer success team and strategic partnerships around the world; our ability to identify targets for and execute potential acquisitions and to successfully integrate and realize the anticipated benefits of such acquisitions;

our ability to maintain, protect and enhance our brand; the sufficiency of our cash, cash equivalents and capital resources to satisfy our liquidity needs; limitations on us due to obligations we have under our credit facility or other indebtedness; our ability to realize the anticipated benefits of our stock repurchase program; our failure or the failure of our software to comply with applicable industry standards, laws and regulations; our ability to maintain, protect and enhance our intellectual property; our ability to successfully defend litigation against us; our ability to attract large organizations as users; our ability to maintain our corporate culture; our ability to offer high-quality customer support; our ability to hire, retain and motivate qualified personnel, including executive level management; our ability to successfully manage and integrate executive management transitions; uncertainties regarding the impact of general economic and market conditions, including as a result of regional and global conflicts; our ability to successfully implement and maintain new and existing information technology systems, including our ERP system; and our ability to maintain proper and effective internal controls.

Additional risks and uncertainties that could affect our financial results are included in the sections titled "Risk Factors" and "Management's Discussion and Analysis of Financial Condition and Results of Operations" in our annual report on Form 10-K for the fiscal year ended January 31, 2024 filed on March 21, 2024 with the Securities and Exchange Commission (the "SEC"), quarterly report on Form 10-Q for the quarter ended October 31, 2023 filed on December 8, 2023 with the SEC, and other filings that we make from time to time with the SEC. Forward-looking statements relate only to events as of the date on which such statements are made. We undertake no obligation to update any forward-looking statements after the date they were made or to conform such statements to actual results or revised expectations, except as required by law.

# Speakers



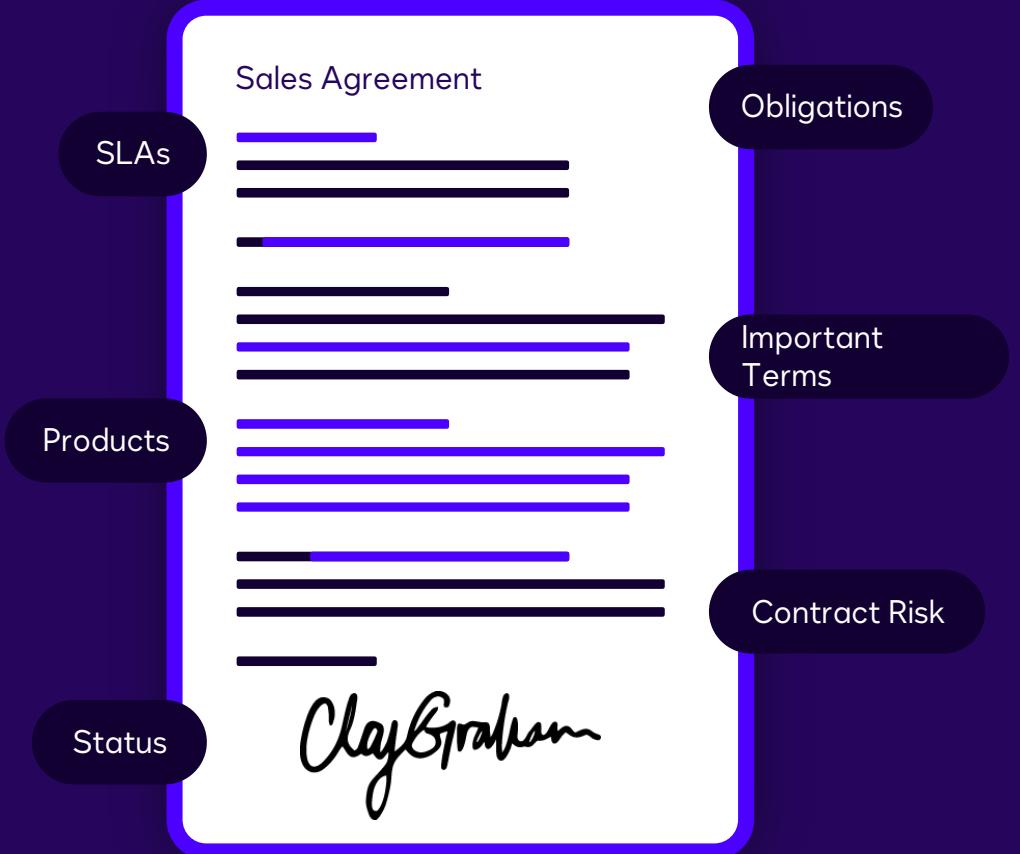
**Shane Meisner**  
Power Platform Team Lead,  
Architect, Administrator, Developer,  
Trainer and Evangelizer  
  
Insurance Company



**Hank Glover**  
Sr. Business Development  
Manager  
  
DocuSign

# The world runs on agreements

Over \$90 trillion of global B2B economic activity relies on agreements each year



# Agreements exist in every function, in every organisation

## Sales

Sales Contracts  
NDAs  
SOWs



## Service

Field Service  
Change Orders  
Work Agreements



## Marketing

Vendor Agreements  
Sponsor Agreements  
Influencer Agreements



## HR

Offer Letters  
Background Checks  
Company Policies



## Procurement

Vendor Contracts  
Purchase Orders  
Termination Letters



## Legal

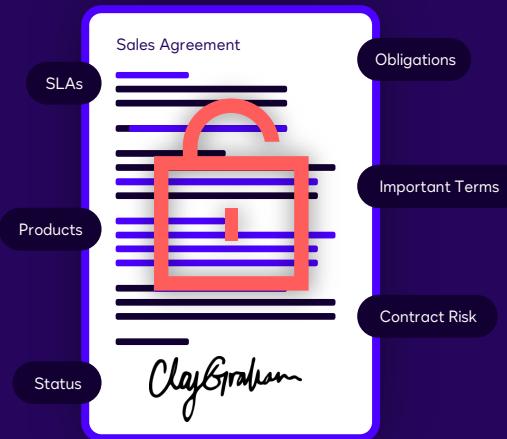
Amendments  
Affidavits  
Power of Attorney

# However, the way agreements are managed is broken

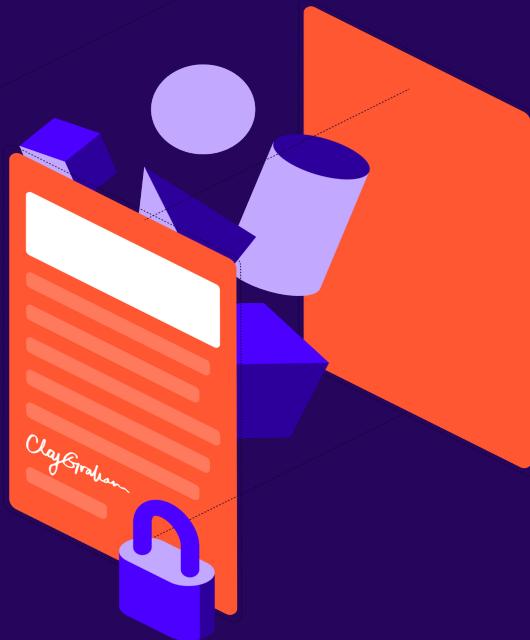
## Disconnected Systems & Processes



## Inaccessible Data



# We call this The Agreement Trap





# We believe in a new way of managing agreements

Agreements must be first-class participants in your business processes

Agreement data must be automated & connected to your workflows and systems

Your functional leaders should be empowered to activate agreement data

# Global Strategic Partners

## Top Tier Partner

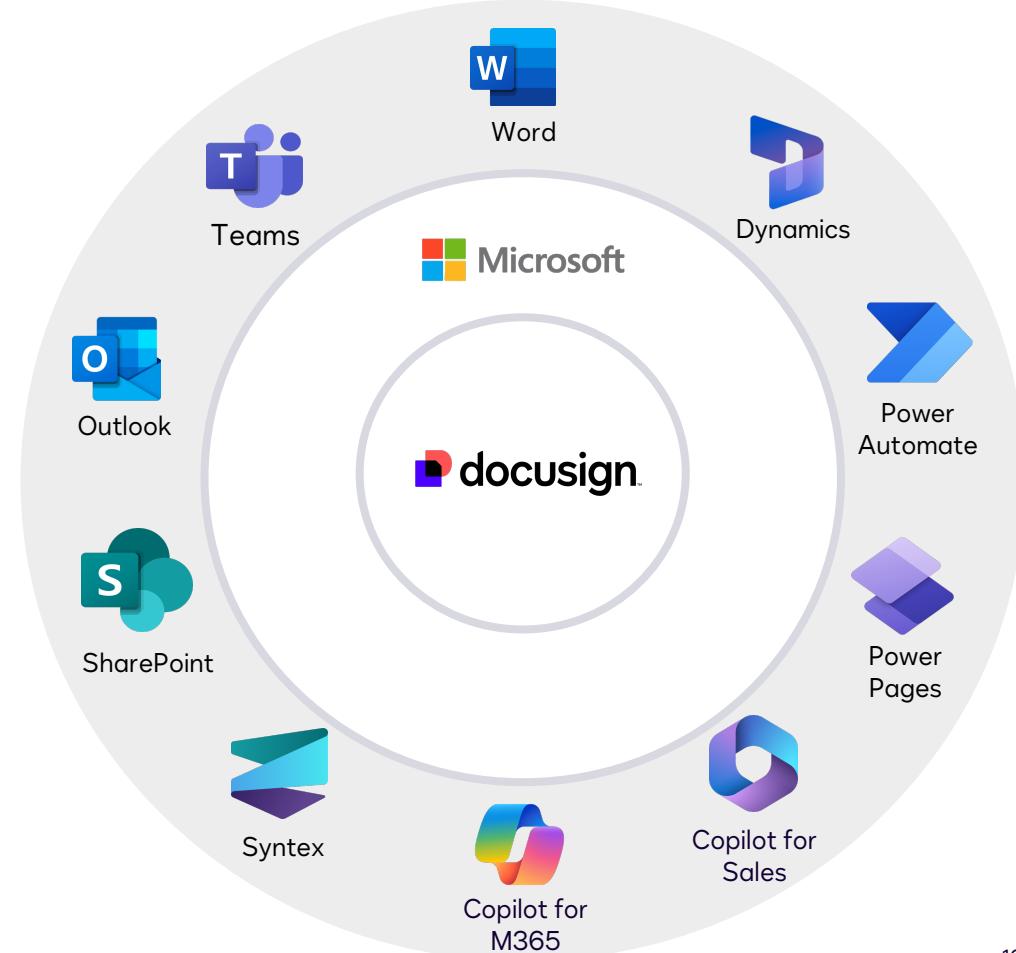
Enabling co-sell and co-marketing motions

## Microsoft Preferred Solution

DocuSign is a Top 5 WW co-sell performing partner

## Strong Executive Alignment

Tightly integrated across Microsoft technologies and continued innovation and expanded integrations



# Revolutionizing agreement workflows together

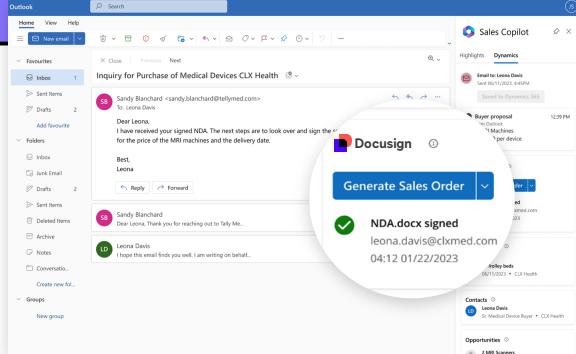
Streamline business processes



## Power Automate

Create automated workflows between your favorite apps to synchronize agreements, get notifications, collect data and more.

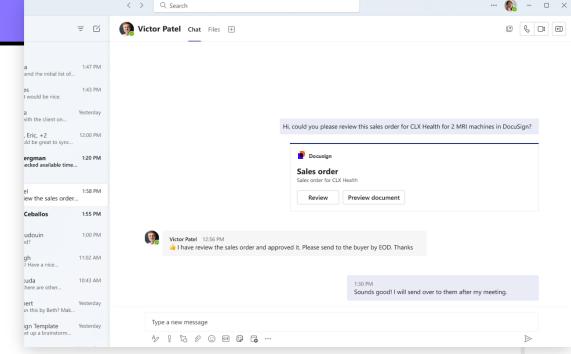
Unlock seller productivity



## Copilot for Sales

Get relevant agreements and latest activity based on CRM data, show agreement status within Outlook, sign or view agreements from Copilot for Sales

Boost employee efficiency



## Copilot for M365

Easily search for agreements, get agreement status and soon generate agreement summaries and send reminders to your colleagues from within M365 apps

# Fortune 200 company automates LOA processes with DocuSign & Power Automate

## Challenge

- Manual process for each Letter of Authority required over 4 hours. With 450 LOAs issued per year, 1,800 hours spent manually processing, signing and storing
- No visibility into approvals, status, or storage
- everything done via email
- Recertification required annually with no easy way to obtain new signatures

## Cost Considerations

### 3rd Party solution

\$500,000 for the first 3 years  
No estimate cost for future years

### Power Platform as a solution

Licensing cost less than \$250.00/year for the premium license and works seamlessly with other existing business application



eSignature

Power Automate

Power Apps

SharePoint

Word

## Solution

- Connect agreement workflows to our broader business workflows with Power Automate to boost efficiency, create better experiences and ensure compliance
- Integrate DocuSign eSignature with Power Automate to streamline LOA signing processes and automatically store completed LOAs in SharePoint

Average **savings**  
**of 1,800 hours**  
**annually** for  
each document  
update



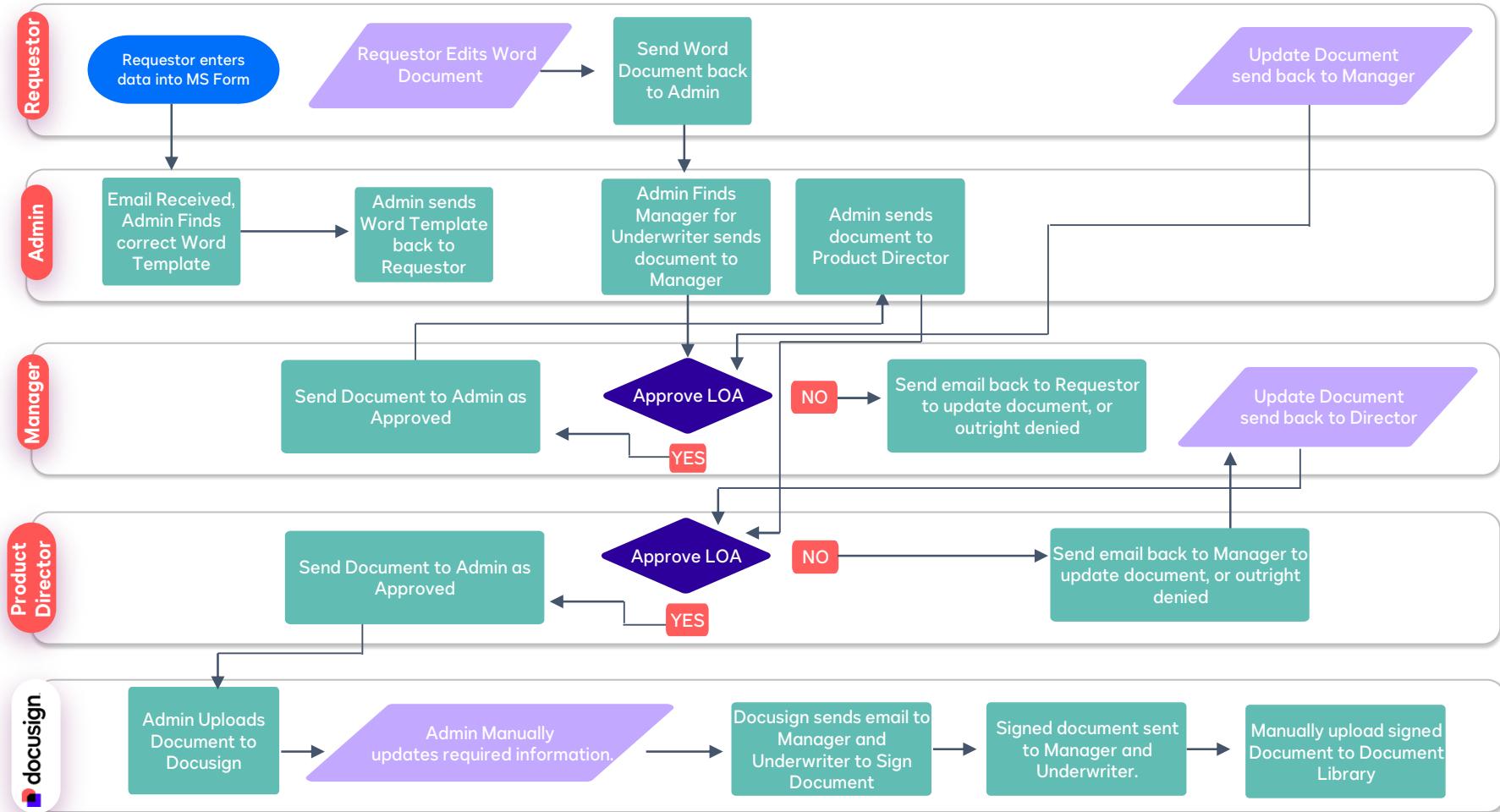
Processing time  
**reduced**  
from **4+ hours**  
**per LOA to less**  
**than 15 minutes**  
per year



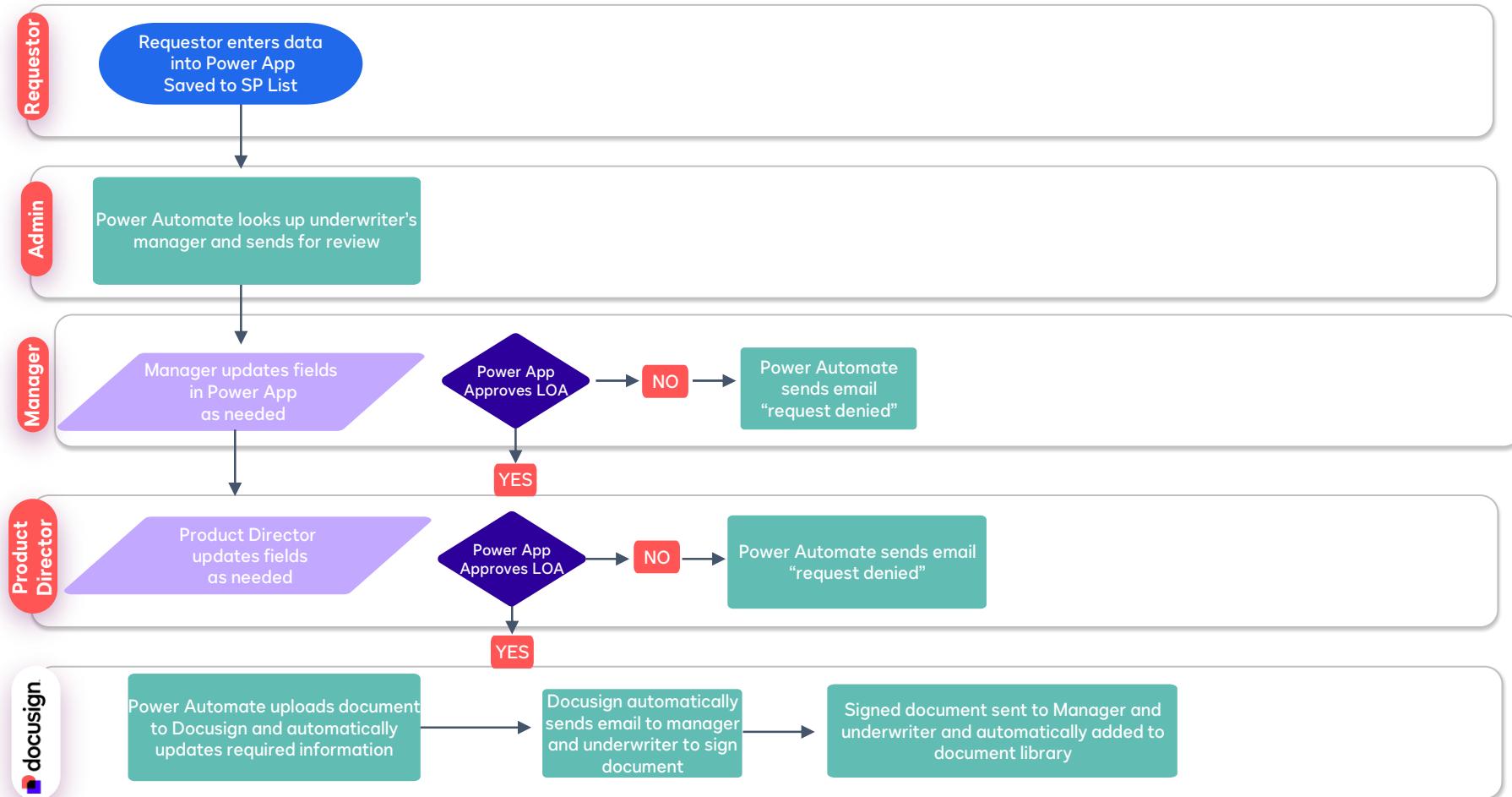
With signature  
updates required  
**twice a year**,  
they have seen an  
**annual savings**  
**of over 3,600**  
**hours**



# LOA Manual Process: 1800 hours each year

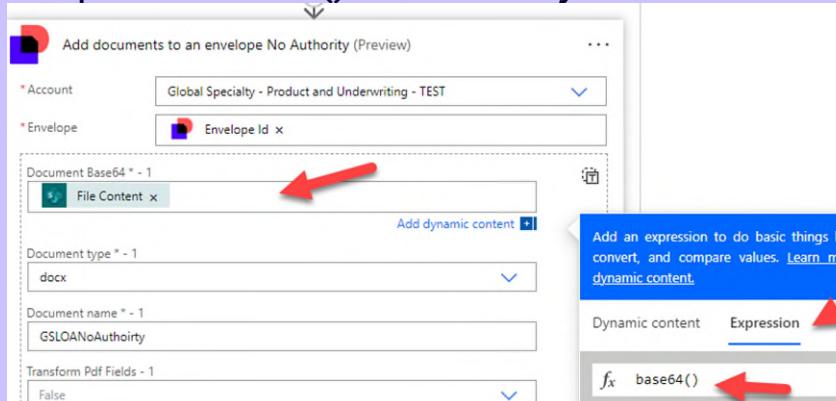


# LOA Automated Process reduced to 15 minutes each year

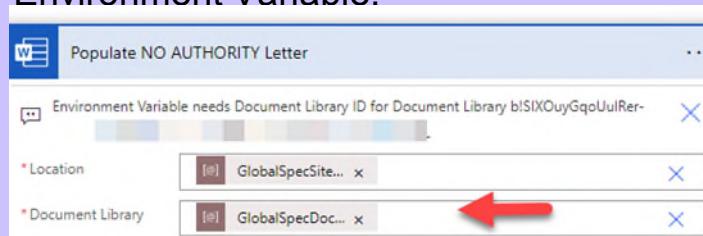


# Best Practices

1. When using the DocuSign Connector Action – Add documents to an envelope, you need to use the expression `base64()` and add the Dynamic content to it:



To populate a Word Template, you need to use the Library ID for the Environment Variable:



Wow, a different  
error message...  
Finally some progress!

