

INTRODUCTION

The next decade will see businesses moving to fully digitalize their key processes and transactions. DocuSign will be a key piece of technology employed to achieve this transformation.

The DocuSign technology is capable of impacting virtually every part of a business. However, when businesses purchase and deploy DocuSign, the focus is typically on adding eSignature to a core business customer-facing process as a first deployment.

While it is appropriate to begin working on external-facing processes that can have a huge positive impact on the business, companies are starting to appreciate that DocuSign can be deployed throughout the enterprise using internal use cases as a parallel first step. These internal use cases provide a rich selection that have varying levels of complexity and value.

DocuSign customers can choose simpler use cases that can be implemented quickly and provide the critical benefits of:

- Early **wins** that build momentum in the program;
- Critical **lessons** learned that can be applied to the most complex and higher-profile use cases;
- **Exposure** of DocuSign to key stakeholders, increasing their awareness, understanding and comfort with respect to DocuSign technology.

This paper presents a broad selection of use cases for Information Technology (IT). In addition, it provides a high-level map of classic IT use cases and how they should be prioritized for implementation.

Use Case Classes

Notify
Acknowledge
Approve
Collect Data
Sign

EXECUTIVE SUMMARY

The goal is to provide a simple, flexible, and high-level “DocuSign for IT Playbook” that any enterprise company can use to take advantage of DocuSign capabilities. We provide a rationale for prioritizing Information Technology (IT) use cases early in the enterprise adoption cycle by citing some of the classic use cases in IT and providing a framework for the order of deployment to maximize results and adoption.

METHODOLOGY FOR PRIORITIZING USE CASES

In order to understand the rationale for choosing IT as the recommended target, we need to understand the methodology of prioritizing use case targets. The two major categories of consideration when choosing use cases to implement are: **ROI & Implementation Speed**.

The following table shows some of the subcomponents contained within ROI and Implementation Speed. The methodology is to evaluate the relative values of these categories and rank use cases where high ROI & fast implementation speed indicate that they should be implemented first. This methodology can be applied to other internal groups such as Procurement, HR and Legal.

Typically, ROI is used as the dominant criteria in choosing an initial use case to be implemented. IT use cases typically have a mid-level ROI but excel in the other categories.

We believe that if all considerations were evaluated, IT use cases would be far more deployed than they are today. We use a simple three-level system on each element, which we use to prioritize the use case on a graph. The values assigned to these categories are heavily dependent on specific company priorities and values but this paper will provide a general evaluation of the known IT use cases as a starting point.

There are two major considerations when choosing use cases:

**ROI and
Implementation
Speed**

THE USE CASES

There are five classes of IT use cases that loosely map to ease of implementation (1 being easiest):

No.	Use Case	Description	Example
1	Notify	Use cases that are intended to inform or notify employees, suppliers or vendors or IT-relevant information.	IT Operations: Planned Service Outage Notification
2	Acknowledge	Use cases requiring confirmation that the employee, vendor or supplier has read/agreed/complied.	Information Security: Computer & IT Asset General Use Policy
3	Approve	Use cases that ask for an approval as opposed to a more formal signature.	Networking: Firewall Modification Request
4	Collect Data	IT scenarios where information needs to be collected from the Recipient(s). Often this is used in combination with another use case class.	Identity and Access Management: Employee VPN Access Request
5	Sign	Binding legal documents that require a legally-defensible signature.	IT Operations: Department Direct Bill Agreement

Generally speaking, the implementation speed of a use case increases as the ease of implementation increases. The implementation speed and rollout are typically driven by the need to integrate with other systems and the number of stakeholder signoffs required.

Below is a table of well-known IT use cases, sorted by IT area and prioritized based on the evaluation of ROI (High, Medium & Low) and Implementation Speed (Fast, Medium & Slow):

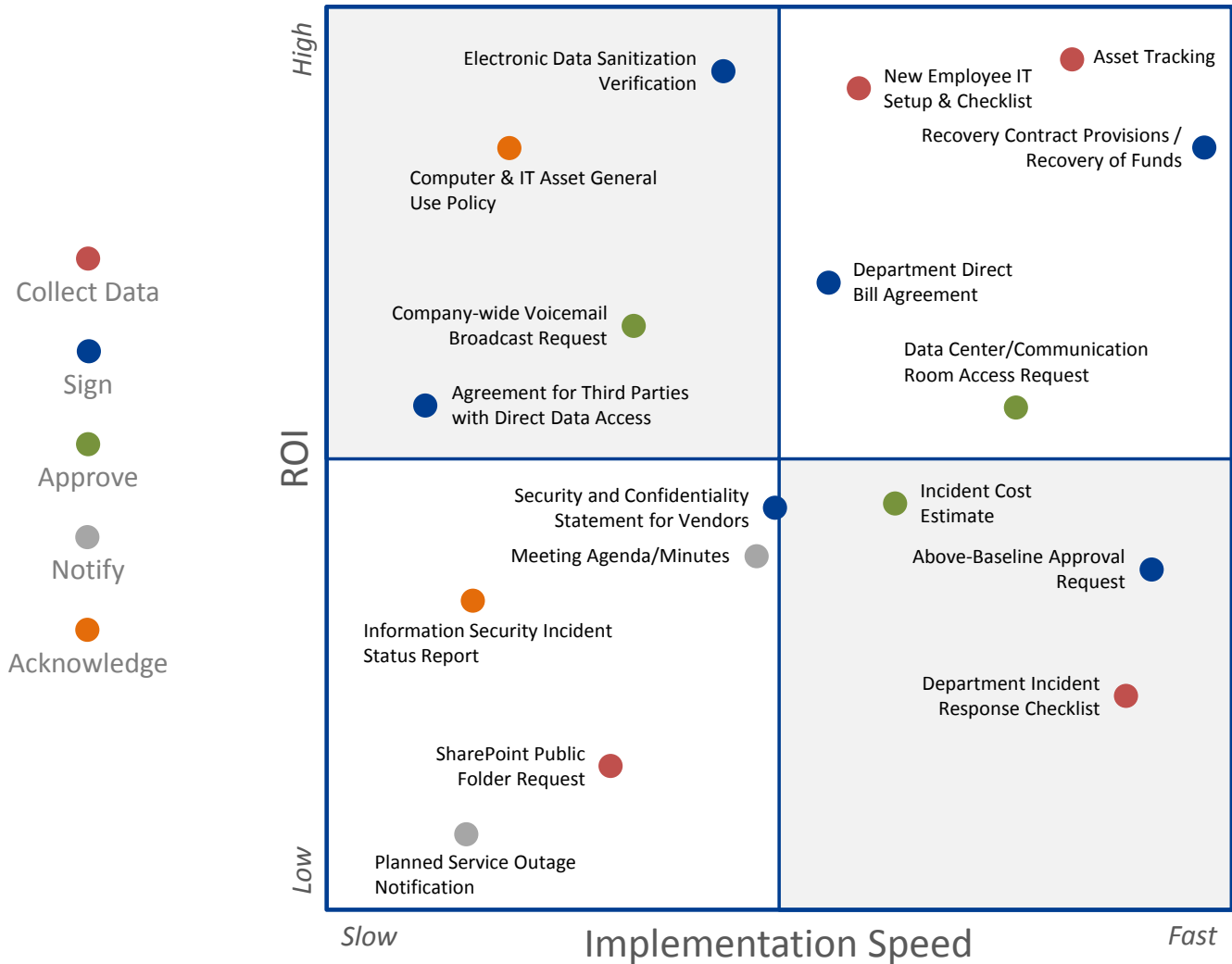
Area	Use Case	Type	Impl. Speed	ROI	Focus
Agreements & Contracts	Agreement for Third Parties with Direct Data Access	Sign	Fast	Medium	External
Agreements & Contracts	Agreement for Third Parties with Indirect Data Access	Sign	Fast	Medium	External
Agreements & Contracts	Data Exchange and System Interconnection Agreement	Sign	Fast	Medium	External
Agreements & Contracts	Standard Non-Disclosure Agreement (NDA)	Sign	Fast	Medium	External
Asset Management	Employee Exit Checklist	Collect Data	Medium	High	Internal
Asset Management	New Employee IT Setup & Checklist	Collect Data	Medium	High	Internal
Asset Management	Record of Property Issued to Employee	Sign	Medium	High	Internal
Asset Management	Asset Tracking	Collect Data	Slow	High	Internal
Asset Management	IT Asset Requisition Request	Collect Data	Medium	Medium	Internal
Asset Management	Advanced Software Purchase Form	Approve	Slow	Medium	Internal
Communication & Collaboration	SharePoint Public Folder Request	Collect Data	Fast	Low	Internal
Communication & Collaboration	SharePoint Site Request	Collect Data	Fast	Low	Internal
Data & Decision Support	Electronic Data Sanitization Verification	Sign	Fast	High	External
Data & Decision Support	HIPAA Compliance	Sign	Medium	High	External
Data & Decision Support	Common Financial System (CFS) Account Request Form	Collect Data	Medium	Medium	Internal
Data & Decision Support	Risk Assessment Evaluation	Collect Data	Slow	Medium	Internal
Identity & Access Management	Contingent Worker Network/E-mail Account Request	Approve	Medium	Medium	External
Identity & Access Management	Data Center/Communication Room Access Request	Approve	Medium	Medium	External
Identity & Access Management	Employee Single Sign On Change Request	Collect Data	Medium	Medium	Internal
Identity & Access Management	Employee VPN Access Request	Collect Data	Medium	Medium	Internal

Area	Use Case	Type	Impl. Speed	ROI	Focus
Identity & Access Management	Identity Account Name Change Request	Collect Data	Medium	Medium	Internal
Incident Management	Breach Notification	Acknowledge	Fast	Medium	Internal
Incident Management	Incident Management Reporting Form	Collect Data	Fast	Medium	Internal
Incident Management	Incident Cost Estimate	Approve	Medium	Medium	Internal
Information Security	Computer & IT Asset General Use Policy	Acknowledge	Fast	High	Internal
Information Security	Employee Security Policy Training/Certification	Approve	Fast	Medium	Internal
Information Security	Information Security Incident Status Report	Acknowledge	Fast	Medium	Internal
Information Security	Standard Operating Environment (SOE) Exemption Form	Approve	Fast	Medium	Internal
Information Security	Information Security Initial Incident Report	Collect Data	Medium	Medium	Internal
Information Security	Lost/Stolen Computer/Electronic Storage Device Report	Collect Data	Medium	Medium	Internal
Information Security	Network Security Checklist	Collect Data	Medium	Medium	Internal
Information Security	Web Standard Compliance & Security Checklist	Collect Data	Medium	Medium	Internal
Information Security	Department Incident Response Checklist	Collect Data	Slow	Medium	Internal
Information Security	Information Security Incident Cost Estimate	Collect Data	Slow	Medium	Internal
IT Operations	Decentralized Systems Quarterly Review Process	Collect Data	Medium	Medium	Internal
IT Operations	Department Direct Bill Agreement	Sign	Medium	Medium	Internal
IT Operations	Memorandum of Collaboration	Approve	Fast	Low	External
IT Operations	Planned Service Outage Notification	Notification	Fast	Low	Internal
IT Operations	Service Discontinued Notification	Notification	Fast	Low	Internal
IT Operations	Unplanned Service Outage Notification	Notification	Fast	Low	Internal
IT Procurement	Recovery Contract Provisions/Recovery of Funds	Sign	Slow	High	Internal
IT Procurement	Electronic and Information Technology (E&IT) Exemption Request	Sign	Medium	Medium	Internal
IT Procurement	IT Project/Procurement Assessment Form	Collect Data	Medium	Medium	Internal
IT Procurement	Procurement Approval Instructions & Request	Approve	Medium	Medium	Internal
IT Procurement	Above-Baseline Approval Request	Sign	Slow	Medium	Internal
Networking	Firewall Modification Request	Approve	Fast	Medium	Internal
RFx/Information Requests	Vendor/Partner Risk Assessment	Sign	Slow	High	External
RFx/Information Requests	Vendor/Partner Security Assessment	Sign	Slow	High	External
RFx/Information Requests	Security and Confidentiality Statement for Vendors	Sign	Medium	Medium	External
Standard PMO Process	Release/Push to Production Request	Sign	Fast	High	Internal
Standard PMO Process	Budget Creation/Approval	Approve	Medium	High	Internal
Standard PMO Process	IT Project Documents	Collect Data	Medium	High	Internal
Standard PMO Process	Client Charter Sign-off	Sign	Fast	Medium	Internal
Standard PMO Process	Meeting Agenda/Minutes	Notification	Fast	Medium	Internal
Standard PMO Process	Project Review Committee Approval	Approve	Medium	Medium	Internal
Standard PMO Process	Work Breakdown Structure	Approve	Medium	Medium	Internal
Telephony	Telecommunications Relocation Request	Approve	Medium	Medium	Internal
Telephony	Telecommunications Repair(s) Request	Approve	Medium	Medium	Internal
Telephony	Telecommunications Service Request	Approve	Medium	Medium	Internal
Telephony	Company-Wide Voicemail Broadcast Request	Approve	Medium	Low	Internal
Third-party Service Providers	Third-Party Financials System Access Request	Sign	Medium	Medium	External
Third-party Service Providers	Third-Party HR Access Request	Sign	Medium	Medium	External
Third-party Service Providers	Third-Party Network Access Request	Sign	Medium	Medium	External
Third-party Service	Third-Party Oracle Database Access Request	Sign	Medium	Medium	External

Area	Use Case	Type	Impl. Speed	ROI	Focus
Providers					
Web Services	Server Change Control Form	Collect Data	Medium	Medium	Internal
Web Services	Web Maintenance Request Form	Collect Data	Medium	Medium	Internal
Web Services	Server System Inventory Form	Collect Data	Slow	Medium	Internal
Web Services	Webpage/Webspace Request Form	Collect Data	Medium	Low	Internal

PRIORITIZATION QUADRANT

By using this approach, an organization can categorize their use case deployments within one of four quadrants. Use cases can be labeled with a Higher or Lower ROI in combination with an Implementation Speed of Faster (Shorter) or Slower (Longer).



RECOMMENDED PLAYBOOK SUMMARY

The following is a high-level summary of the recommended playbook for accelerating the rollout of DocuSign throughout your enterprise. The steps below IT opportunities as the guidepost but the same methodology can be applied to other business units as well.

Section	Description
Review	<ul style="list-style-type: none"> Review the IT use case library provided.
Identify	<ul style="list-style-type: none"> Identify 'Big Bang' (upper quadrants of graph in the 'Prioritization Quadrant' Section) core business use cases. Identify a blend of IT use cases that fit your environment and resources using the prioritization quadrant as a rough guide. Look for 'self-service' use case opportunities where DocuSign PowerForms can be leveraged.
Implement	<ul style="list-style-type: none"> Implement the quick win IT use cases. Begin working on the 'Big Bang' scenarios early. Begin work on other IT use cases working your way through the prioritized list.
Strategy	<ul style="list-style-type: none"> Find other internal use case opportunities (Procurement, HR, Legal, Finance) and follow the same methodology to prioritize use cases.
Measurement	<ul style="list-style-type: none"> Collect feedback and incorporate into 'Big Bang' use cases.
Best Practices	<ul style="list-style-type: none"> It's recommended that implementations for more complex use cases begin early in the process while in parallel, work on foundational efforts such as SSO, Security, Archiving, and Application Integration begin to take shape.

CONCLUSION

The potential benefits of deploying DocuSign across your organization is clear as the need for Digital Transaction Management (DTM) is becoming more and more apparent. A few factors have come together to cause this shift: (1) The need to streamline operations, (2) Requirements to transact via mobile, (3) Initiatives to go paperless, and (4) A desire to accelerate the improvement of various client experiences.

It is our hope that this whitepaper provides more reasons than ever to deploy DocuSign use cases in your departmental organization. Below, we selected an easily-digestible 'Top 5' list of use cases vetted from the use cases presented in this whitepaper. We consider these the best opportunities to drive results immediately.

Area	Use Case	Type	Impl. Speed	ROI	Focus
Asset Management	New Employee IT Setup & Checklist	Collect Data	Medium	High	Internal
Information Security	Computer & IT Asset General Use Policy	Acknowledge	Fast	High	Internal
Information Security	Employee Security Policy Training/Certification	Approve	Fast	Medium	Internal
Standard PMO Process	IT Project Documents	Collect Data	Medium	High	Internal
Asset Management	Asset Tracking	Collect Data	Slow	High	Internal

About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management™. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

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