DocuSign®

The definitive framework for successful digital transformation

A three-phased approach to get the most out of your digital change efforts

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I. The 'How' of digital transformation

In the early days of my career in Customer Success, I heard far more "why" questions about implementing new technology: "*Why* do I need this technology?" or "*Why* does this technology matter to our company?"

But in the past few years, these questions are more often about the "how" – "That solution will save us time, but how do I get my team to adopt it?" or "*How* will we find the time and buy-in to overhaul an established process?"

It's clear to me that company leaders know they need to infuse new technologies into their businesses to remain relevant and grow, but implementing change is daunting. And that's when the "how" questions arise.

At DocuSign, we face these "how" questions head-on with our more than 500,000 customers who are adopting the **DocuSign Agreement Cloud** to modernize their systems of agreement: the processes and technologies used to prepare, sign, act on and manage agreements.

We understand that successful implementation, integration, and adoption are the bedrock of digital transformation. As a result, we stand behind having a framework for transformation that's proven to help companies not only design for digital success, but also significantly reduce the risk associated with digital change efforts. From there, it's about doing the upfront work to envision and implement digital strategies that will make transformation a true competitive differentiator.

In this guide, we will share a detailed look at our three-phased approach to digital transformation – Implement, Optimize, Grow – along with real customer stories of transformation success and helpful tips from each phase. Now you can start your digital transformation journey, or even reignite a stalled project that still holds promise, with knowledge and confidence, instead of fear and push-back.

– Lambert Walsh, SVP Customer Success, DocuSign

Ask the experts: What does digital transformation mean to you?

Finding the right approach to change means thinking outside of the box.

"Digital transformation translates to better experiences for your customers resulting in an impact on their business and yours."

Lambert Walsh
SVP Customer Success
DocuSign

"Digitization is not a technical strategy. It's the establishment of new business models and the examination of business processes that need to be re-engineered in support of the new business model."

Kevin Bandy
former Chief Digital Officer
Cisco

II. Implement: Set the vision

How your company sets up its initial implementation will dictate later expansion. Implementing the technology in one area of your business is the most focused (and practical) way to get started. Here's how to begin your digital transformation to ensure you set yourself up for success down the road.

What you will accomplish in the implement phase:

- Lay the framework for building a Center of Excellence.
- Go live with initial solution(s).
- Develop a governance model.
- Begin defining and documenting best practices, enablement, and lessons learned.
- Set baseline metrics for calculating ROI.

Select use cases

Select an area of the business that is a natural fit for the technology you're implementing. Be smart about where you start. Choose high priority, high value use cases because you will need early success and a high ROI to help justify further expansion.

Establish best practices and strategies to support rollout

What you learn from the initial project will help inform future growth. With one use case, you can mimic a larger rollout without exposing a significant portion of the company to the risks of introducing new processes and technology.

Create an initial governance model

A key piece of any digital transformation is establishing a governance model. This ensures a unified strategy, usage guidelines, and resource allocation. Keep in mind, however, while your governance model may start as a single set of rules to guide your digital transformation, as your business and/or industry grows, your model will also need room for updates and changes.

Building a Center of Excellence

Building out a Center of Excellence is a key activity on your digital transformation journey. The Center of Excellence is a central hub of people within your organization that manages

Amgen's vision for the workplace of the future: think big, start small.

Amgen, one of the world's leading biotechnology companies, knew that if it was going to remain competitive in the notoriously complex healthcare industry it would need to improve the efficiency of its global operations. After reviewing many solutions, Amgen business leaders selected DocuSign's eSignature technology to decrease manual processes and enable employees to work together from anywhere at anytime.

With a strong vision for a future enterprise-wide roll out, Amgen purchased 600,000 envelopes from DocuSign for use over a three-year timeline. Amgen forged ahead with a strategic approach: establish a successful model for implementation with one department and then expand to others.

Laying the groundwork for success.

Embracing a hands-on approach to implementation, Amgen worked with DocuSign to create a "Center for Enablement" (their equivalent of a Center of Excellence) to implement DocuSign eSignature in its HR department. The Center for Enablement created a detailed pre- and post-implementation plan, established who would have access to and manage the software, troubleshoot any potential issues that might arise during implementation, and created a detailed awareness and communication plan to educate new users.

your roadmap, support model, enablement strategy, and shares best practices and training based on their knowledge from previous implementations. In the Implement phase, the people involved in executing the first use case serve as the foundation for your Center of Excellence and carry that knowledge forward as other initiatives get underway.

Get hands-on with implementation

The word "implementation" is generally associated with IT, developers, and professional services teams. But a successful implementation is hands-on and involves business leaders and day-to-day users, too. Why? One goal of the one-department implementation is to gather as much feedback as possible in order to refine processes and learn what can be done differently as the implementation expands to other departments.

Shape a vision for the future in three steps

With any digital transformation, it's important to get others excited about the possibility of digital change in order to facilitate larger adoption. Here are three steps to help others see the promise of the technology.

Step 1: Offer learnings from implementation and adoption

Gathering lessons learned from an initial rollout is one of the most valuable tasks you can complete in the early stages. Once you know the pain points and successes, share these with other teams or departments to give them a sense of how they can use the technology, too.

Step 2: Share value and ROI over time

Let's face it, business leaders — from the CFO to the CEO — want to see the business value of new technology. As you begin to implement new solutions, it is important to track the value and ROI. To make these numbers have impact, set a baseline. Are you trying to improve sales productivity? Decide on a metric like "hours spent per deal" and calculate where you are currently. Setting this baseline early makes it easier to calculate and share ROI metrics down the road.

Step 3: Gain executive sponsorship

It's never too early to gain executive sponsorship, which is one of the most important factors to a successful digital transformation. An executive sponsor can help communicate the value of a technology to the larger team. He or she can be a persuasive voice to get end users to adopt faster — and can also be an early user with valuable feedback.

III. Optimize: Get centralized

Success in one use case or department means you're ready to expand to others. But this is often where transformation efforts stall. As multiple use cases go live, the adoption process can become disjointed and disorganized. In this phase, the goal is to get each use case operating with a vision for centralization ahead. All their work creating governance models, training content, and best practices will culminate in an enterprise-wide Center of Excellence that powers the final stage of transformation.

What you will accomplish in the Optimize phase:
- Go live with two to three more departments.
- Develop governance models, best practices, and training content in parallel.
- Gain executive sponsorship.
- Make a business case for a centralized Center of Excellence.
- Begin the formation of an enterprise-wide Center of Excellence.

Roll out new use cases

Replicate your initial success with other use cases. Here's how to start your expansion:

Identify new use cases

At this stage, your transformation is still a proving ground. The next two to three use cases should be high priority and high value. That means they are use cases with processes that are inefficient or outdated, and that will show clear productivity, revenue or profit gains.

Your digital change effort stalled. Now what?

Not every implementation will go exactly as planned, but with a little preparation and foresight, you can work through even the toughest roadblock. Below are a few of the most common reasons why digital transformation efforts stall—and how you can get things back on track.

You lack executive sponsorship.
One of the main reasons companies struggle with usage, adoption, or value is lack of executive sponsorship. It's critical that executive sponsors are both passionate about digital transformation and have the clout to champion change and navigate politics. Your CIO, head of sales, or head of innovation and technology are typically great executive sponsors due to their baseline knowledge of technology and business processes.
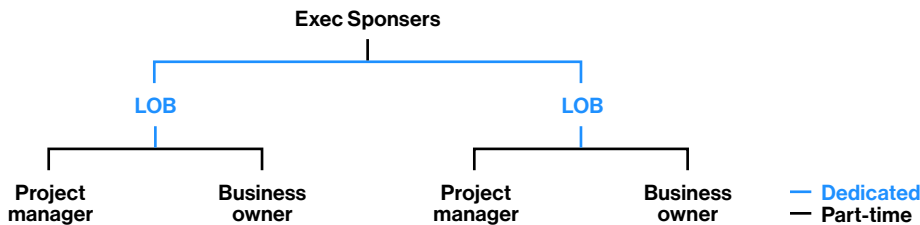
You lose your superstar.
It's almost inevitable during a long-term transformation effort that a key player is promoted, moves into a different area of the business, or leaves the company. Prevent this from holding up implementation by ensuring all institutional knowledge is documented and you have a turnover plan. Also consider multiple part-time resources dedicated to implementation rather than a single superstar.

There isn't enough buy-in.
It's normal to experience some resistance to a new technology when you are working to expand to new departments. The best thing you can do in this situation is to calculate the ROI of the existing use cases and promote your successes. Everyone is working to achieve efficiencies, so show how much time and money you're saving to make a compelling case.

Centralize your team

Define roles and responsibilities by creating a centralized organizational structure for the teams in charge of implementation in each department. A key role to fill here is that of the executive sponsor. At least one sponsor for each two to three lines of business is a good target. Here's a simple org chart to get you started:

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                        Exec Sponsers
          ┌──────────────────┴──────────────────┐
         LOB                                    LOB
     ┌────┴────┐                          ┌──────┴──────┐
  Project   Business                   Project      Business      ── Dedicated
  manager    owner                     manager       owner        ── Part-time
```

Develop best practices, governance, training, and ROI models in parallel

As multiple departments roll out in parallel, they should each be developing their own governance, best practices, and training materials, and calculating ROI. It is valuable to each department to document this, but it will also be valuable to the centralized Center of Excellence as inputs when establishing enterprise-wide standards.

"Building a Center of Excellence means you're creating an infrastructure for self-reliance. You are taking the domain expertise that has been developed through the initial steps of the journey and then encapsulating that into a working group that can design for digital success within their business."

Lambert Walsh
SVP Customer Success
DocuSign

The case for a centralized model

As more departments complete implementations, it's time to start thinking about creating efficiencies and moving toward a centralized Center of Excellence. This is a group of internal experts, mostly managed by IT (but with strong business-user support), dedicated to establishing standards and driving the enterprise-wide success of a specific technology.

Why make the shift to centralization? And when is the right time?

Centralizing is mostly about self-reliance, scale, and speed as you expand your implementation. There is no specific rule for when you should shift to a centralized model with a Center of Excellence, but it often happens after about three departments are up and running. More generally, it's when there are enough experts and best practices in place to centralize that knowledge in order to efficiently scale. It can also be at the point where multiple departments operating separately becomes unwieldy and carries some cost, compliance and governance risk.

How intel used centralization to unlock new use cases

With 13 instances of DocuSign across the organization but no coordination between them, Intel set out to consolidate its solutions and centralize management. Through this process, Intel leaders hoped to not only create consistency across departments, but also identify previously overlooked processes ready for digital transformation.

To coordinate the centralization effort, Intel created a Center of Excellence which helped those departments already using DocuSign improve processes and leverage more features. During this effort, new use cases were unlocked in areas that were previously overlooked. The Center of Excellence identified 12 different use cases for the company's HR department alone.

Understanding that there were likely more use cases company-wide, the Center of Excellence spread the word about DocuSign to new departments through information on Intel's intranet, physical marketing in the company cafeteria, and a digital newsletter promoting its successes with HR. This promotion sparked interest in DocuSign across the organization and helped expedite expansion to other business units, like legal and finance.

Since the centralization effort began, Intel's usage has grown significantly to over 7,600 agreements, culminating in 15,000 hours and $90,000 in annual savings for the company.

IV. Grow: Make digital transformation a core competency

The critical pieces are in place: several thriving departments, multiple executive sponsors, a thorough base of training content and best practices, and, hopefully, a strong desire from other departments to get on board. Now you're ready to establish a Center of Excellence to drive enterprise-wide adoption and make digital transformation a core competency at your company.

What you will accomplish in this phase:

- Establish a company-wide Center of Excellence.
- Centralize key functions including communications, governance, purchasing, support, and more.
- Continue to move toward enterprise-wide adoption.
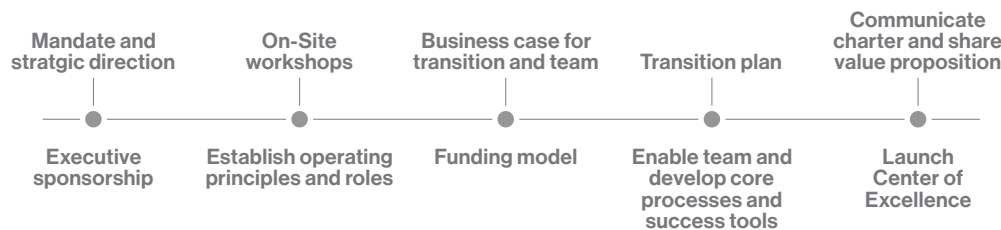- Create a digital transformation model for future technology implementations.

Building a Center of Excellence

How do you actually build an enterprise-wide Center of Excellence? Here are some first steps to get you started.

The journey to Center of Excellence

Once you have reached the "tipping point" described in the previous section, here are the steps you can take to formally create a Center of Excellence:

Mandate and stratgic direction	On-Site workshops	Business case for transition and team	Transition plan	Communicate charter and share value proposition
Executive sponsorship	Establish operating principles and roles	Funding model	Enable team and develop core processes and success tools	Launch Center of Excellence

1. Identify executive sponsorship

The Center of Excellence team should consist of experts in a variety of functions that have worked on a prior implementation.

2. Host on-site workshops

Before an official launch, they should get together and discuss their mission, priorities and role in helping their company's digital transformation.

3. Create a funding model

Unless the establishment of a Center of Excellence is standard operating procedure at your company, you will likely have to make the case to secure funding to implement a new technology enterprise-wide.

4. Write a transition plan

Develop a documented plan to transition to a centralized model, including the new processes and assets that will be in place upon the official launch of the Center of Excellence.

5. Launch the Center of Excellence

A launch is almost always a communications exercise more than anything. But this is your chance to share your mission, role, and value proposition with the rest of your company. It should be taken seriously, because the visibility associated with a launch is an opportunity you may never have again.

The role of the Center of Excellence

We have talked about the general purpose of the Center of Excellence, but what does it actually do? Here are its five focus areas led by the Center of Excellence for an entire enterprise-wide rollout based primarily on the early experiences and takeaways from initial line of business rollouts:
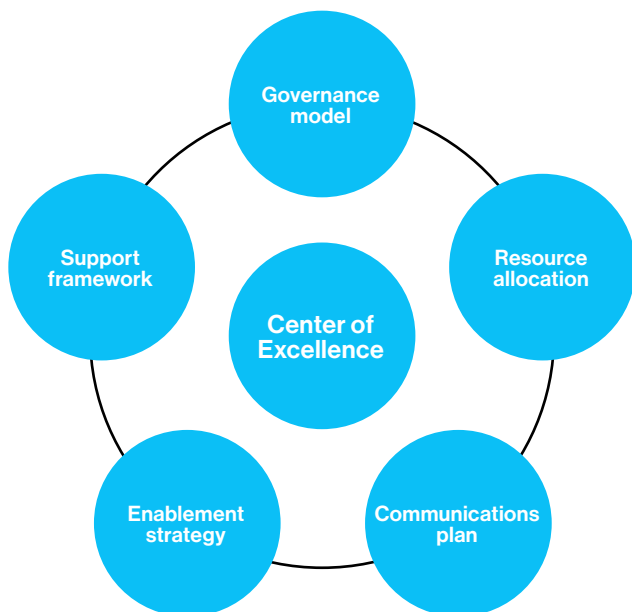
Internal change agents: the foundation of Telstra's Center of Excellence.

When Telstra, Australia's largest telecom provider, began its DocuSign implementation in 2014, the company knew that "quick wins" were essential to successful expansion and adoption of the technology. These wins were rooted in eight use cases to digitize with DocuSign based not only on the need for a digital agreement solution, but also on the profile of the internal stakeholder for that business unit. These stakeholders had to be ambitious with a strong desire to do something new and groundbreaking.

The first use cases included organizations across the company: from recruitment to small business sales to procurement. Their first goal? Prove the model. Telstra calculated that DocuSign would save users AU\$32 in productivity and hard costs (like paper and postage) per agreement, a metric that resonated across all business units and use cases.

As the technology was implemented, these initial champions became the DocuSign Center of Excellence that would drive the company's expansion over the next few years. They had three primary functions:

1. **Pre-sales:** sell the vision for DocuSign to get new business units on-board.

2. **Delivery and adoption:** own implementation and ensure employees are using DocuSign as expected.

3. **Managed service:** internal support for training, metrics, communications strategies and more.

Today, Telstra has expanded across the company including some of their most sensitive use cases. The next step is integration with their core systems, driven by the now-expanded CoE of changemakers.

Governance model

In early phases, individual lines of businesses established their own governance models. The role of the Center of Excellence is to make sense of those and turn them into a documented governance model for the entire company's digital transformation. A governance model and greater oversight of usage and standards can not only improve your ROI, but also decreases legal and compliance risks.

Resource allocation

In early phases, individual lines of businesses established their own governance models. The role of the Center of Excellence is to make sense of those and turn them into a documented governance model for the entire company's digital transformation. A governance model and greater oversight of usage and standards can not only improve your ROI, but also decreases legal and compliance risks.

Communications plan

Communication is a critical part of adoption. People want to know why and how this technology affects them. The Center of Excellence is in charge of making this process easy for each department. A centralized communication plan enables everyone to see the aggregate value of the deployment and gain a clear view on how it benefits their department and the company as a whole.

Enablement strategy

Based on their experience, the Center of Excellence comes up with the necessary plan — including training materials and documentation — to empower teams to get up-and-running quickly.

Support framework

The Center of Excellence is internal support and should set up the processes and resources that address support issues throughout the company.

A global communications imperative

Communications and executive sponsorship are two of the most important drivers of digital transformation. Just like a company that launches a new product, if they don't communicate its existence and value in order to get potential customers emotionally bought-in, the product will likely fail. Same goes for digital transformation efforts.

Here's how to approach a successful global communications strategy:

Tailor the approach to each audience: Know your audience and tailor messaging and format to them. Do they mostly reside in one building? Set up an in-person town hall.

Offer various formats: While some people want to watch a video, others may want to read or attend an event in person. Give people many options to consume the message.

Focus the message: No matter the format, make sure your message is consistent and clear. Focus on the head (logical reasons for the value of adoption) and the heart (emotional, personal reasons for the value of adoption).

Be transparent: People want to be aware and part of the process. Be transparent and open throughout implementation — whether it's good or bad news.

V. The promise of enterprise-wide transformation

Companies transform with the help of technology for a wide variety of reasons, but primarily it's to shape the future of the company—creating new or improved experiences for customers and employees while driving revenue and growth.

Digital transformation is not an end state, though. In fact, in today's economy, transformation is an ongoing process that requires rethinking business processes and applying adaptive, intuitive technology to make them possible. It's a process that needs to be repeated for companies to stay relevant. That's why having a solid framework and approach for digital transformation is a true competitive advantage for companies looking to move fast and grow.

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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