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Whitepaper

How to Transform Your Business with Digital Workflows

You're ready to transform how your organization gets work done. That means rethinking how your employees collaborate and how your customers interact with you. Convenience and productivity are at the core of these experiences, and it's critically important to harness modern, digital tools to provide them.

The workflows that make your company function touch every part of it, including sales, marketing, HR, legal and IT—each with its own processes, interdependencies and potential bottlenecks. Analyzing, optimizing and decluttering these creates a better user experience, and a better business.

This whitepaper helps you rethink traditional collaboration and agreement processes and design digital workflows that make life easier for the people who need to fill in, track and monitor corporate forms. We illustrate how digital workflows outshine traditional pen-and-paper transactions, show how to create flawless online experiences and make it easy to migrate from the dotted line to online.

Meet your new favorite technology

Of all the technology that exists, your favorite is likely the one that makes your life simpler and better, such as a robotic vacuum cleaner or internet-connected exercise equipment. Almost none of us would include "digital workflow" tools on our lists. But if you've ever filled out an online form or managed workflow in a seamless way, you know how much of an impact it can have.

Ask the doctor who spends more time on paperwork than practicing medicine. Or the realtor who needs a homebuyer to sign on the dotted line when in-person closings aren't possible.

Getting users to fill out documents and follow online procedures is critical to their success and sanity. This "paperwork" isn't optional; most of these documents are legally required. Anything that smooths the process enables people to spend more time doing things they want to do.

Often a mixture of manual and digital processes, these agreement processes can be confusing and error-prone at best. At worst, they can be a huge productivity drain and security risk. A fully automated and digital system that encompasses every function of your organization—such as offer letters, sales contracts, real estate agreements, technology procurement and NDAs—is the ideal state. You're likely already on the manual-to-digital transformation spectrum. Even making incremental progress toward that end goal by intentionally designing and digitizing each workflow process will help you realize immediate benefits.

A well-designed agreement workflow doesn't simply duplicate a paper process. When you think through each step ahead of time, and only keep what's necessary, it improves the experience for everyone involved: employees, customers and the business owners who serve them.

Online workflows solve the problems of paper, taking what's good about traditional agreements and making them better with powerful new technology. Here's how to go about it.

Why transition to all-digital agreement processes

Thanks to advances in technology, we no longer have to fashion quills from feathers and grind our own ink, or even print, sign and scan documents. But offices that adhere to paper are still using these types of deprecated processes. Even if you're well on your way to fully digital workflows, manual and paper steps anywhere in your process will undermine your overall efforts.

You don't have to work like that anymore. Here's why an all-digital agreement workflow is the best option.

Collaborate with anyone, anywhere
Your work doesn't exist in a vacuum. You collaborate with bosses, clients, vendors, colleagues and teams. All of these people contribute to a business process workflow, from answering questions to inputting data. When your agreements are managed online from end to end, you can work together, even when you're not in the same room. Or the same time zone. Or even the same country.

Control and record access
The moment you create a document in a digital agreement workflow, the authorship is attributed to you. As readers interact with the document—commenting, signing, editing, negotiating, etc.—a detailed record is kept of all activities.

Imagine your product is almost complete, but it requires signoff from several departments, such as finance and legal, before launch. Fortunately, you can select which members of the product team have VIP access to your document and who has to wait behind the velvet ropes. Better yet, each user is authenticated individually, so you know that Samantha from accounting is actually Samantha from accounting, and not a competitor.

Keep historical records
Let's say you wrote a document, but your client wants major changes before it's finalized. You rewrite the document. But then the client's management team shifts direction. With version history, you can go back to a document's previous drafts, as far back as the day it was created. Since version history is saved automatically, you don't even have to click the save button as you go.

Work even when you're not in the office
Remote work went from pandemic necessity to pandemic perk. Now even the least nimble holdovers are edging away from working in a centralized location to working in a distributed way.

Store documentation and increase knowledge
Online forms have a benefit that our paper document users can only dream of: With a few keystrokes, you can organize your data into a dataset, and then derive insights from it. For example, if clients are filling in online forms to ask for product availability, one side effect is a collection of location information that becomes insights about customer purchasing habits. That data can be collected automatically, in a fraction of the time it took to collate the data from a stack of papers.

Save time and money
Digital input saves time that you can put to better use. You don't have to wait for people to fill out paper forms, only to waste time re-inputting the data later. Plus, paper-based offices often still rely on the hassles and delays of snail mail. This streamlined workflow ultimately saves you (and your company) money.

These are the features anyone can appreciate. As you design a new digital workflow, look for opportunities to take advantage of these tools. For example, do you have a date field for a signature? Your document knows who created your document and at what time, so that information can be configured to automatically prefill.

Don't leave behind perfectly good functionality, or miss the opportunity to delight a user.

How to create digital workflows

First, you have to map out the entire existing agreement process, from creation to completion, storage and eventually end of life. This comprehensive mapping is more than just workflow steps: take everything into account, including stakeholders, timelines and integrations with other systems.

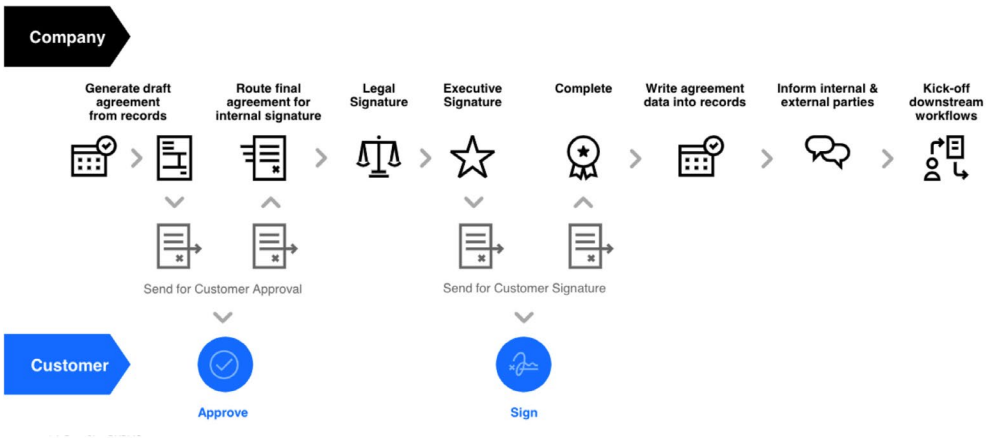
Then map out your ideal process. It's easier to transition from existing to ideal when both states are thoroughly mapped. Make sure every detail is covered, like determining what information should be on each form or in each document and create a workflow to intelligently direct users through the process.

Digital workflows don't magically appear. You have to create them. At first, it may seem simple: Just replicate your original paper document and you're done. But duplicating a legacy paper process misses the point. After it's set up, a digital document workflow can do so much more.

Interview stakeholders about the current agreement process

According to Lisa Maria Marquis, the author of Everyday Information Architecture, there are two tried-and-true ways to create an online workflow.

- Start with a blank sheet. It doesn't have to be paper. **Map out the workflow as it currently exists** (and yes, some of it may be digital already). Identify who's responsible for what and at what point in the process. Here's an example:



- Next, **speak with the people responsible for each touchpoint**. Ask them how they handle their tasks and what they need from others to accomplish them.

Pay attention to their answers—and the things they don't say.

- Ask the stakeholders what each task is supposed to accomplish. If there isn't universal agreement on purpose, it means you need to change processes.
- Challenge assumptions. Why are they collecting a data point? Does the user need to check that box? Really? For sure? Who actively uses that data? If nobody knows, maybe you don't need to ask for it.
- Learn what roadblocks your stakeholders encounter. Gather examples.
- Find out what happens to documents after each individual signs off. For example, in a complex project, a document may need approval from multiple sources. Identify who touches the document inside and outside your organization. Create a hierarchy to determine the order in which the document is propagated, ideally using software to track the progress (and to take care of reminders).

Consider how the workflow integrates systems

Some workflows stand alone; most do not. It's common for any system to intersect with other systems, such as those that address different parts of the agreement process. Your digital workflow redesign has to take those into account—particularly because things fall between the cracks wherever there are gaps or intersections.

Your existing systems probably have found some sort of equilibrium, however imperfect. But in a digital transformation redesign, consider how the changes affect other systems, how they can improve them and the effort that other departments may need to make to encompass the new capabilities. Are there existing workflows that can be connected? Can backend processes be triggered by a new event? Are there approvals needed? To increase productivity and decrease risk, consider how and where documents are stored.

Perhaps the new workflow can integrate with other existing systems (such as customer relationship management, enterprise management tools or messaging systems). That can save you time, but it also has a change management benefit: You get more participation when people can continue to work within the systems that they use every day.

Build workflows collaboratively

Don't put the responsibility of creating a new workflow on one person. Make this project a group activity. "This creates a stronger sense of ownership among the stakeholders," Marquis said. "It also helps create a sense of alignment that can carry through to other document process logistics, like governance and archival systems."

Collaborate on a baseline workflow map. Ask stakeholders to edit it together, so you can collaboratively identify what is and isn't important about current processes. This way, teams learn the intricacies of their colleagues' day-to-day tasks and become more invested in improving the process for everyone involved.

What parts of your process work really well now? Think long and hard before breaking them. You might even find a shortcut by starting at your desired endpoint and working backward.

Once you have a top-down view of the current processes, you can build a workflow that meets your user goals and clears the bottlenecks you identified.

Design for usability

For stakeholders to access the content they need, content needs to be findable, understandable and usable.

Findability

Can users locate the right form? Digital documents need to be findable by the people using them. Many online processes seem obvious to the people who use them daily. However, the same can't be said of work that is done infrequently, say, during quarterly reports or when a new employee is onboarded. Therefore, design the system for easy access using sitemaps, menus and search boxes. Use tags and keywords to surface content precisely when you need it. Use email notifications to direct people to the exact document they need to sign.

Takeaway:
Assume that end users don't know where they're going. Offer easy directions and hints to take them to the next step in their journey.

Understandability

Write documents that make sense to the people who read them. Include clear and concise instructions. When users find what they're looking for, they should know what the documents mean and how to interact with them. Assume that if it's at all possible for users to misunderstand written information, they will. (We're looking at you, arcane government forms.)

Takeaway:
Give your documents headings and structure, which make them easier to read than solid blocks of text.

Usability

Once your user has found and understood your workflow, they have to be able to use it. Have you provided a call to action? Is there a next step, such as filling in an extra form, downloading a file or making a phone call? If so, include that in your messaging. Clarify what comes next in the user's process, and set expectations, such as when to expect a response.

Alternatively, have you given too many calls to action? Pare down the action items to reduce your number of pain points to zero. Ensure that the user can reach a human being to help them resolve problems, including the usability mistakes you made because you made the wrong assumptions.

Takeaway:
Provide clear yet simple instructions. The simpler, the better.

Test, launch, iterate. Repeat.

Moving from theory and design to testing and deployment is an exciting step. It can seem like you've crossed the finish line but, of course, the work doesn't stop there. After launching, you should expect—and plan for—an ongoing, dynamic solution. That's the beauty of digital workflows: As user feedback comes in and metrics are analyzed, process and workflow tweaks are much easier to make in response. Keeping things agile and optimized is key to keeping employees and customers happy.

Test internally then externally

You interviewed stakeholders and collaborated at every possible point. It's time to release your new workflow into the wild.

It should work perfectly.

Not quite. There will always be workflow steps that are unexpected or accidentally left on the cutting-room floor. Testing digital workflows is always an iterative process. Don't cause yourself undue stress by expecting perfection out of the gate. A few more rounds of back-and-forth edits and your new processes should be simplified. It's time to usher in a new era of online workflow.

Again, not quite. Many businesses face pushback in the face of change, because for many people, change is inconvenient. Change is difficult. Change is scary.

This is where change management comes in. It is okay to call out that change may be inconvenient—but it's also a fact of life. Listen to your stakeholders' concerns, but make sure someone takes on the role of change manager in your transition to digital workflows.

Measure and remeasure

As you launch each new digital workflow, it's critical that all teams are constantly communicating about what's working and what isn't. Sharing a set of goals and common metrics to analyze performance is a good way to make sure that all teams are aligned at each step of the process. That's why it's important earlier on in the planning stage to clearly identify what success looks like. That can, and probably should, change over time as you make process improvements.

Reiterate and reintegrate

Silos develop, training stagnates, tools deprecate and productivity dips. This is an unintended but natural consequence of change. If not consistently addressed, adoption and positive user experiences will decrease. Leaders should reinforce the positive impacts of each new workflow and how it builds on the overall goal of a fully digital system. This helps drive a culture of frequently retraining users and refreshing the various complementary tools and integrations in service to the ideal end state.

Design documents to minimize data entry error

The most obvious difference in the management of digital agreement documents is the size, shape and form factor—and how those affect the design process.

Paper forms are linear. Readers start at the top and work their way down. Digital workflows, however, are anything but linear. A digital workflow is interactive and solicits user input, which may or may not have a call to action. Whatever the nature of the agreement—a shared contract or order form, for example—it does not need to be limited to a single page.

As you sketch out the design of your online agreement workflows, work to minimize and streamline the information your users can supply. Constraining the input to drop-down menus and checkboxes means that users make fewer mistakes, which means the results are consistent and valid.

What comes next

The basic guidelines we've covered so far will get you started using your new digital workflow. After the celebrations that accompany a successful launch, there'll be continual management and measurement to ensure you get the most out of your new process.

Additionally, if this new digital workflow is only one part of your overall system, you'll want to continue thinking bigger: digitally transforming your end-to-end agreement processes to drive maximum value for your organization.

It's clear you can no longer afford to ignore the costs of legacy agreement processes. Outdated tools and tactics are direct causes of needless waste and reduced profit. Digital transformation, even through a small-scale adoption model, will help your organization realize immediate value. DocuSign customers have demonstrated savings of $27 per document in hard costs and productivity when using digital agreement processes.

DocuSign has the tools and technology to help you get the job done—and the workflow expertise to help you simplify and streamline agreement workflows. Get started today.

Do your part for the planet

Paper goods, which include office paper, accounted for roughly a quarter of U.S. municipal solid waste. Digital workflows can help eliminate paper waste while cutting costs. Make going digital a consideration in your green initiatives.

Consider the needs of each user—not just the company collecting data. Usability also encompasses user comfort—particularly when your document processes intimidate people.

It's easy for a digital workflow designer to think in terms of the people who run the show (and pay your salary). If you genuinely want to create a great user experience, think about ways to make end users happy.

- **Design the structure of digital forms with consideration of each question's anxiety level ("first name" is low, "yearly income" may be high). You might pose the high-anxiety questions up front to ensure that only interested, qualified users proceed to the easy stuff. Or you might include the high-anxiety questions near the end, after the user is committed and is more likely to answer them—if, indeed, you even need to ask those questions.**
- **Online documents can be dynamic. Take advantage of this capability. Ask for ZIP code first; that can prepopulate city and state fields, which means less typing and more accuracy. A background process can assist users as they input data with data validation and auto-completion.**
- **Look for opportunities to include responsive search on fields. Don't make someone type in "Cleveland" if the options are limited; when the user types enough of an option to enable a unique choice ("c l e v e ..."), you're done.**
- **Consider new forms of data input. For example, can you enable users to input data-scanned sources such as a camera image?**

There's no right or wrong answer to these issues. But think about the options at each step.

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, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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