

Platinum Success Pack

Bundled success offering for Enterprise customers looking to maintain, optimize, and grow.

Platinum Success Pack (PSP) is a bundled plan for Enterprise customers looking to ensure solution uptime, establish efficient governance models, and ultimately continue their digital transformation. PSP provides access to recurring benefits, including advisory and learning services, technical support, and proactive support across your lifecycle.

Learn

Flexible training options and learning experiences with Campus Pass*.

Learn and practice new skills to turn your knowledge into business outcomes. Maximize the value of your DocuSign investment with Learning Services designed to meet you throughout your journey.

- Self-paced courses to learn at your own pace
- Demo-driven, [instructor-led webinars](#)
- Activity-driven, instructor-led courses to build skills and deepen expertise

*Campus Pass instructor-led courses available for up to 12 users

Adopt & Optimize

Refine existing solutions or adopt new features with an annual Solution Review

This is a technically focused review of a deployed solution to provide actionable recommendations for optimization.

- Benefit from years of agreement expertise & industry-proven best practices in 1:1 consultation.
- Validate the implementation of your existing solution
- Gain insights of the latest technology to help optimize user experiences and plan for long-term success.
- Explore where newly released features can drive incremental business value for you.

Services at a Glance

Best for

Enterprise businesses

Core services

Learning Subscription (12 named users)
Advisory & Adoption Services
Proactive Technical Resource
Enterprise Premier Support
Sandbox Access

Key/Core/ Products covered*

DocuSign IAM
DocuSign eSignature
DocuSign CLM
DocuSign Click
DocuSign ID Verification
DocuSign Rooms for Real Estate
DocuSign eWitness
DocuSign Monitor
DocuSign Notary
DocuSign Retrieve
Digital Signatures

Connectors covered*

eSignature for Salesforce
Gen for Salesforce
Google Suite
Microsoft Productivity Suite
Microsoft Teams
Dynamics
Sharepoint Online
NetSuite
Zoom
Slack

Service Parameters

Your Account Team will reach out upon purchase of your Success Pack to help you get started. You can also submit a request for guidance through our Success Pack Portal for immediate assistance.

*This list is not exhaustive. There are no product exclusions for Platinum Success Pack.

Please note that implementation is not included in your Success Pack and is an additional fee.

Transform

Expert advice to enhance your solution and maximize the value you get from DocuSign.

Annual, expert-led, fixed-scope Program Review from expert consultants. Identify the greatest areas of opportunity during your lifecycle to promote best practices or remedy unhealthy accounts. This review will include an overview of your governance / COE model, account structure, and health assessment of existing system architecture, user roles, and account settings.

Possible deliverables include:

- **Use Case Roadmap:** Understand your current business landscape and potential digitization strategy
- **Program Overview:** Document the people, processes, and technology of your complete DocuSign footprint. This includes policies, resources, and the technology footprint that exists today.
- **Program Health Check:** Assess the overall health of your program on multiple facets such as governance, resourcing, enablement, communication, and support.
- **Program Plan:** Outline all the technical tasks that need to be done for DocuSign beyond individual use cases. Dates and owners are tracked as well.

Support Services

Support that scales with you.

We'll give you sandbox access, and if something breaks, we're here to help fix it. Enterprise Premier Support provides the fastest response and issue resolution for your business-critical agreement processes.

Enterprise Premier Support

- Fast initial response time <2 business hours to get answers fast
- Global emergency support response time <30 mins
- Up to 10 hours of Advanced Support guidance when refining and further enhancing your API integration.

Sandbox Access

- eSign/IAM QA Sandbox

Get started whenever you're ready

Your Platinum Success Pack landing page is your one-stop shop. You can learn everything you need to know about your new Success Pack, access all of the resources in your entitlement, and log support cases if you need extra assistance.

We are the Agreement Experts

DocuSign's Customer Success team provides comprehensive solutions and success capabilities including professional services, adoption and enablement programs, and support plans to help you accelerate time to value and outcomes for your business.

Our Agreement Experts are with you every step of the way to help you get you started, drive adoption across your organization, optimize your solution and discover new opportunities with DocuSign. To learn more, contact your account team or sales@docuSign.com.

Platinum Success Pack Benefits at a Glance		
Capabilities	Overview	Included
Campus Pass Subscription Build skills to achieve results faster	Access to public, activity-driven deep dive courses. Learn, practice new skills, build credibility, and turn your knowledge into business outcomes.	Individual (12 named users)
Solution Review Technically-focused review of deployed solution	- Hold a remote, dedicated workshop to revisit your implemented solution - Validate that your solution was implemented using our best practice methodology and make recommended changes if necessary. - Identify where newly released features can drive incremental business value.	1X/Annually
Program Review Identify areas of opportunity and promote best practices	This review will include an overview of your governance / COE model, account structure, and health assessment of existing system architecture, user roles, and account settings. Possible deliverables include: - Use Case Roadmap - Program Overview - Program Health Check - Program Plan	2X/Annually
Proactive Support Services Protect and enhance your experience	A <i>dedicated Technical Resource</i> proactively protects and enhances your experience by preventing downtime, offering personalized support, and advocating for your needs in product development. This resource will... - Monitor platform telemetry and global support engagements to guide technical risk mitigation and optimization. - Prioritize and resolve issues fast with in-depth knowledge of your technical account history and serve as a direct link to the Docusign engineering and IT operations teams. - Provide proactive change management for new product functionality, APIs, and configuration best practices; ongoing support during major infrastructure and architecture changes. - Facilitate collaboration by advocating for customer needs and providing visibility into the Docusign product roadmap, enabling two-way transparency in development processes.	•
Always On Support Services Keep business moving forward with always-on help	Target Initial Response Time From the time the online case is opened via the Support Center	<2 business hours
	Technical & Connector Support Direct access to technical support teams for configuration-specific questions. Limited to standard, pre-built Docusign Connectors (Google, Microsoft NetSuite, etc.)	•
	Sandbox Access 1 eSign QA Sandbox	•
Success On-Demand Essentials to inspire your transformation	Docusign Support Center Stay up and running with access to knowledge, tools, and self-guided resources	•
	Digital Learning Self-paced courses in the Docusign University Learning Portal and YouTube	•
	Customer Community Engage with other Docusign users and get peer support	•

Gold Success Pack

A comprehensive services bundle that supports success throughout every step of your journey.

With the Gold Success Pack, you can simplify what you buy and receive continued support, adoption services, and optimization assistance throughout your license. GSP provides you with bundled learning and demo environment access to support building diverse expertise in a dynamic business landscape.

Adoption Services

Guidance to deploy and adopt with speed and confidence

Unlock new opportunities faster with DocuSign through repeatable outcome-based onboarding and adoption activities. Get up and running quickly, tackle adoption hurdles, expand use cases, and learn best practices with adoption resources designed to guide your success and unlock new opportunities to ensure continued growth with DocuSign.

- Onboarding, use case review, and configuration guidance
- Prescriptive adoption tools and tips to start your journey
- Solution optimization and use case expansion
- Product usage and feature adoption expertise
- Ongoing success planning activities

Get started whenever you're ready

Your Gold Success Pack landing page is your one-stop shop. You can learn everything you need to know about your new Success Pack, access all of the resources in your entitlement, and log support cases if you need extra assistance.

Learning Services

Flexible training options and learning experiences with Campus Pass*.

Learn and practice new skills to turn your knowledge into business outcomes. Maximize the value of your DocuSign investment with Learning Services designed to meet you throughout your journey.

- Self-paced courses to learn at your own pace
- Demo-driven, [instructor-led webinars](#)
- Activity-driven, instructor-led courses to build skills and deepen expertise

*Campus Pass instructor-led courses available for up to 6 users

Services at a Glance

Best for

Medium to large-sized businesses

Core services

Adoption Services
Learning Subscription (six named users)
Advisory Services
Premier Support
Sandbox Access

Products covered

DocuSign IAM
DocuSign eSignature
DocuSign CLM
DocuSign Click
DocuSign ID Verification
DocuSign Rooms for Real Estate
DocuSign eWitness
DocuSign Monitor
DocuSign Notary
DocuSign Retrieve
Digital Signatures
DocuGen for eSignature

Connectors covered

eSignature for Salesforce
Gen for Salesforce
Google Suite
Microsoft Productivity Suite
Microsoft Teams
Dynamics
Sharepoint Online
NetSuite
Zoom
Slack

Service Parameters

Following the submission of a request for guidance, you will be connected to an Adoption Expert to provide repeatable guided assistance for your eSignature and IAM use cases.*

*Excludes DocuSign CLM, Insight, etc (services scoping required)

Advisory Services Engagement

Expert advice to enhance your solution and maximize the value you get from DocuSign.

No matter where you are in your journey, our team offers flexible support tailored to your needs, from initial adoption guidance to in-depth optimization of your deployed solution.

Annual, expert-led, fixed-scope delivery from expert consultants. Choose one of the following.

<i>Use Case Roadmap: Plan your next steps.</i>	<i>Solution Review: Assess a previous deployment, including...</i>
- Define your business landscape and strategy - Develop a high-level roadmap using industry insights and benchmarks - Decide where to execute next	- Use of recommended best practices - Potential value from newly released features - How to adapt to ever-evolving business needs

Support Services

Support that scales with you.

We'll provide you with sandbox access, and if something breaks, we're here to help fix it. Global Premier Support provides fast responses and developer support for your complex agreement processes.

Premier Support

- Fast initial response time <4 business hours to get answers fast
- Global emergency support response time <1 hour
- Up to 5 hours annually of advanced API support on existing integrations

Sandbox Access

- eSign QA Sandbox

We are the Agreement Experts

DocuSign's Customer Success team provides comprehensive solutions and success capabilities including professional services, adoption and enablement programs, and support plans to help you accelerate time to value and outcomes for your business.

Our Agreement Experts are with you every step of the way to help you get you started, drive adoption across your organization, optimize your solution and discover new opportunities with DocuSign. To learn more, contact your account team or sales@docuSign.com.

Gold Success Pack Benefits at a Glance		
Capabilities	Overview	Included
Adoption Services Deploy with confidence via expert-led guidance	Onboarding & Adoption Expertise Guidance around deploying qualified DocuSign use cases via a mix of digital and direct engagement. Post-deployment adoption guidance to drive continued success through a mix of digital resources, exclusive webinars, and access to our adoption experts	•
	Digital Onboarding Review a 4-step checklist to access all available Success Pack content as well as the ability to request guidance when you're ready to engage with your dedicated success resource	•
Learning Services Build core skills to achieve results faster	Campus Pass Learning Subscription Access to public, activity-driven deep dive courses, including eSignature Administration, Working with Templates, and more	Individual (6 named users)
Advisory Services Enhance your solution and maximize the value you get from DocuSign	Annual Advisory Services Each year, choose between a Solution Review or a Use Case Roadmap. These advisory services, provided by expert DocuSign resources, help your business stay ahead of the curve with the latest and greatest of what DocuSign has to offer.	•
Support Services Keep business moving forward with always-on help	Live Support Log a case and when requested, customer support will promptly call you back to address technical questions, how-to's, account management, and more.	•
	Target Initial Response Time From the time the online case is opened via the Support Center	<4 business hours
	Technical Support Direct access to technical support teams for configuration-specific questions.	•
	Connector Support Limited to standard, pre-built DocuSign Connectors (Google, Microsoft NetSuite, etc.)	Connectors
	Sandbox Access eSign QA Sandbox	•
Success On-Demand Essentials to Inspire your transformation	DocuSign Support Center Stay up and running with access to knowledge, tools, and self-guided resources	•
	Digital Learning Self-paced courses in the DocuSign University Learning Portal and YouTube	•
	Customer Community Engage with other DocuSign users and get peer support	•

Silver Success Pack

Surrounding you with success, at every step of your DocuSign digital transformation journey.

Invest in your success with critical, purpose-built services that empower your organization. **Accelerate deployment, drive adoption, boost workforce performance and realize value faster** by leveraging our deep expertise, guidance and support to help you do more with DocuSign Intelligent Agreement Management (IAM).

Adoption Services

Guidance to deploy with confidence and realize value faster Accelerate your time to value with a mix of on-demand resources and guided assistance from the start. Designed to get you up and running and unlock new opportunities, faster.

- Onboarding, use case review and configuration guidance
- Prescriptive adoption tools and tips to start your journey
- Solution optimization and use case expansion
- Product usage and feature adoption expertise
- Ongoing success planning activities

Launch your project whenever you're ready

With our [Success Pack digital onboarding experience](#), you'll be able to initiate your engagement when you're ready, access all of the resources included in your entitlement, and log support cases if you need extra assistance.

Already a customer and don't need to onboard? Scroll to the [bottom of the onboarding page](#) to "request guidance" to engage with your success resource.

Learning Services

Upskill your DocuSign admin to drive impact

Maximize the value of your DocuSign investment with flexible training options and learning experiences designed to meet you throughout your journey. – Self-paced courses to learn at your own pace

- Free, demo-driven, [instructor-led webinars](#)
- Deep Dive, activity driven courses to build skills and deepen expertise.

Services at a glance

Best for

Small to medium-sized businesses that are deploying IAM solutions

Core services

Adoption Services
Learning Subscription (one named user)
Always-on Support
Success on-demand

Products covered*

DocuSign IAM
DocuSign eSignature
DocuSign Click
DocuSign ID Verification
DocuSign Rooms for Real Estate DocuSign eWitness
DocuSign Monitor
DocuSign Notary
DocuSign Retrieve
Digital Signatures
DocuGen for eSignature

Connectors covered

eSignature for Salesforce
Gen for Salesforce
Google Suite
Microsoft Productivity Suite Microsoft Teams
Dynamics
Sharepoint Online
NetSuite
Zoom
Slack

Service Parameters

Following the submission of a request for guidance, you will be connected to an Adoption Expert to provide repeatable guided assistance for your IAM use case.

*Excludes DocuSign CLM, Insight, etc (services scoping required)

Support Services

Maintain business continuity

Find answers on-demand, get direct access to technical experts for configuration specific questions, and manage cases online for faster resolution..

- Call back service to boost workforce productivity
- Access to value-oriented support anytime, anywhere
- Fast target initial response times to get answers fast

Success On-Demand (Resources)

Success at your fingertips

Hit the ground running fast with the essential knowledge, skills, and access to self-help channels, included with every DocuSign license agreement, surrounding you with success resources to inspire your transformation.

- Digital learning to build expertise as you go
- Always-on access to our extensive support knowledge base
- Best practices and tools to accelerate adoption
- Community access to gain best practices from peers

Silver Success Pack Benefits at a Glance		
Capabilities	Overview	Included
Adoption Services Deploy with confidence via expert-led guidance	Onboarding & Adoption Expertise Guidance around deploying qualified DocuSign use cases via a mix of digital and direct engagement. Post-deployment adoption guidance to drive continued success through a mix of digital resources, exclusive webinars and access to our adoption experts	✓
	Digital Onboarding Review a 4-step checklist to access all available Success Pack content as well as the ability to request guidance when you're ready to engage with your dedicated success resource	✓
Learning Services Build core skills to achieve results faster	Campus Pass Learning Subscription Access to public, deep dive courses including eSignature Administration, Working with Templates, and more	Individual (1 named user)
Support Services Keep business moving forward with always-on help	Phone Support (Call Back) Log a case and customer support will promptly call you back	✓
	Target Initial Response Time From the time the online case is opened via the Support Center	6 business hours

	Technical Support Direct access to technical support teams for configuration-specific questions	✓
	Connector Support Limited to standard, pre-built Docusign Connectors (Google, Microsoft NetSuite, etc.)	Connectors
Success On-Demand Essentials to inspire your transformation	Digital Onboarding Experience Self-guided onboarding paired with digital adoption resources to support your journey	✓
	Docusign Support Center Stay up and running with access to knowledge, tools and self-guided resources	✓
	Digital Learning Self-paced courses in the Docusign University Learning Portal and YouTube	
	Customer Community Engage with other Docusign users and get peer support	

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