

SCG Corporate

DocuSign Service Definition

Customer Product Definition Document

Version 1.1

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1. Introduction

The DocuSign Agreement Cloud for Public Sector lets public servants focus more time on their mission, bringing together a comprehensive set of applications and integrations to modernize government agencies' systems of agreement. DocuSign Agreement Cloud customers are empowered to digitally transform end-to-end processes for all agreements, including signing, approving, and managing complex documents. The result is government entities that are faster, simpler, smarter, and greener.

2. DocuSign eSignature

The eSignature solution trusted by hundreds of millions of users.

From sales contracts and offer letters to account openings and invoices, agreements are everywhere. With DocuSign eSignature, you can complete contracts, approvals, and other agreements in minutes rather than days. And because it's part of the DocuSign Agreement Cloud, you can extend these benefits to other stages of the agreement process, such as preparing, acting on, and managing agreements.

2.1 DocuSign eSignature Benefits:

DocuSign eSignature accelerates agreements, eliminates manual tasks, and makes it easy to connect with the tools and systems you're already using.

- **Do business faster:** Send and sign agreements securely from virtually any device. Up to 82% of agreements are completed in less than a day, and 49% in less than 15 minutes.
- **Be more efficient:** DocuSign eSignature eliminates manual tasks and increases convenience for your customers and employees.
- **Save money:** DocuSign eSignature saves an average of £45 per agreement by reducing hard costs and improving employee productivity.

Sign your agreements quickly and securely. Complete the process faster with automated routing, signer identification, and legally enforceable capture of signatures. Partner options include additional methods of signer verification, for countries and industries with specialized requirements.

- **eSignature:** Send, sign, and succeed with the world's #1 electronic signature product.
- **Identify:** Choose from several enhanced ID options, including verifying government-issued IDs.
- **Standards Based Signatures:** Support certificate-based signing, including eIDAS, AES, and QES.
- **Click:** Capture consent to standard agreement terms with a single click.
- **Hybrid Cloud Appliances:** Deploy DocuSign eSignature in your datacenter

2.2 DocuSign eSignature Features

- **Sign from anywhere:** Our highly-rated mobile apps for iOS, Android, and Windows let you work on the go—even when you don't have internet access.
- **Instant status visibility:** Always know where your agreement is in the signing process. Set automatic reminders and receive notifications at every step.
- **Collect the details you need:** Add standard fields to your agreement like a signature or date or create and save custom fields.
- **Support for 44 languages:** DocuSign offers users the ability to sign documents in 44 localized languages and to send in 14.

- **Reusable Templates:** Save time and standardize processes by storing frequently used agreements along with their custom fields, recipient routing, and other settings.
- **350+ integrations, leading APIs:** Integrate and connect eSignature with the systems and tools you already use.
- **Highly Secure:** DocuSign meets some of the most stringent US, EU, and global security standards, and uses the strongest data encryption technologies available.
- **Industry Leading Availability:** DocuSign's eSignature infrastructure has enabled us to deliver over 99.99% platform availability worldwide for the last 24 months.
- **Lawful and court-admissible:** DocuSign eSignature complies with the U.S. ESIGN Act and UETA, as well as the EU eIDAS Regulation. We automatically generate and store a robust audit trail for every agreement.

3 DocuSign Envelope Offerings

DocuSign offers several envelope plans. Each successive plan introduces new incremental features. Features of each plan are shown below.

Envelopes can be purchased both in volumes of which will allow access to multiple users across your organization or for a more controlled in Seats option allowing access to nominated users with 100 envelopes per user aggregated across the organisation.

Basic Features	Standard	Business Pro	Enterprise Pro
	Professional Signing Experience	Customized Signing Experience	Sophisticated Workflows and Compliance
• Basic & Business fields • Document routing • Automatic reminders • Mobile access • Responsive Signing • 900+ Partner Integrations	Including features + Team functionality: • Sharing across multiple users • Comments • Delegated Signing Professional Documents: • Custom branding • API Access • Scheduled Sending • Performance Analytics • Remote Online Notary ** • Multi-Channel Delivery ** • Business Process Integrations: Salesforce, Microsoft Dynamics, NetSuite ** • Regional Modules **	Standard Edition included + Advanced Fields & Agreement: • Custom fields, custom forms • Payments • Drawing • <u>eWitness</u> • <u>Automation</u> • Bulk Send • <u>PowerForms</u> • Agreement Actions • EHR Interoperability • Web Forms • Industry Modules (\$) • Testing Environment (\$) • Smart Sections (\$)	Business Pro Edition included + Security & Compliance • SMS Authentication • Org. Mgmt. • Access Mgmt w/ SSO (incl. Custom Email Domain) Advanced Workflows & Customization: • Supplemental Documents • Signing Groups • Multiple brands • Delayed & Conditional Routing • Elastic Signing Reporting, Analytics & Testing: • QA Testing Environment • Data Feed API

** available at an additional cost

The Business Pro and Enterprise Pro plans form the basis for DocuSign's new innovative solutions CLM and IAM.

4 eWitness and eSealing with DocuSign eSignature

In July 2020, the HM Land Registry (HMLR) in England issued practice guidance for using Witnessed Electronic Signatures (WES). This change allows the use of electronic signatures for transferring property and other dispositional deeds through HMLR.

There are several key requirements for witnessed electronic signing, including both:

- The physical presence of the witness
- One Time Password (OTP) authentication for both the signers and the witnesses

4.1 eSealing

DocuSign enables the use of electronic seals in Europe and other regions. These seals can be requested via API without any manual interaction. Custom integration can be built that requests a seal the moment the document is generated and stores the completed document on a file server.

Alternatively, we can pick up the documents in a file server, seal them, and then return the document to the same or another file server.

4.2 eWitnessing

DocuSign provides court-admissible witness evidence. Every document signed with DocuSign ESignature comes with a court-admissible Certificate of Completion that provides legally admissible proof of the signing. For transactions with witness recipients, information about the witness, such as occupation, address, email address, IP address, and time stamps, is also captured in the Certificate of Completion to provide suitability of signature and witnessing process to all transaction parties. CBC can turn off geo-localisation if preferred.

With DocuSign eWitness, organizations have greater insight into the location of the witness than with traditional methods and can check that the document was correctly witnessed.

5.0 Conditional Routing



Many DocuSign customers have complex recipient routing needs that are currently unmet. For example, sales discounts need a different set of signers depending on the amount of the discount. These customers are currently using manual processes (either in conjunction with or outside DocuSign) to manage these routing needs or to use numerous templates. Conditional recipients is one of the Advanced Recipient Routing features.

Conditional recipient enables customers to configure rules to automatically route envelopes to different recipients based on envelope data. For example, if a purchase order is above a certain amount, the envelope will be sent to a different approver than if the request were under that amount. This eliminates the need to manually correct the envelope midway or to use separate templates with slight variations in routing.

Admins can enable and disable conditional routing from the 'Sending Settings' page.

6.0 Organization Administration

With DocuSign's Organization Admin, you can control your company's agreements with the 5 steps below.

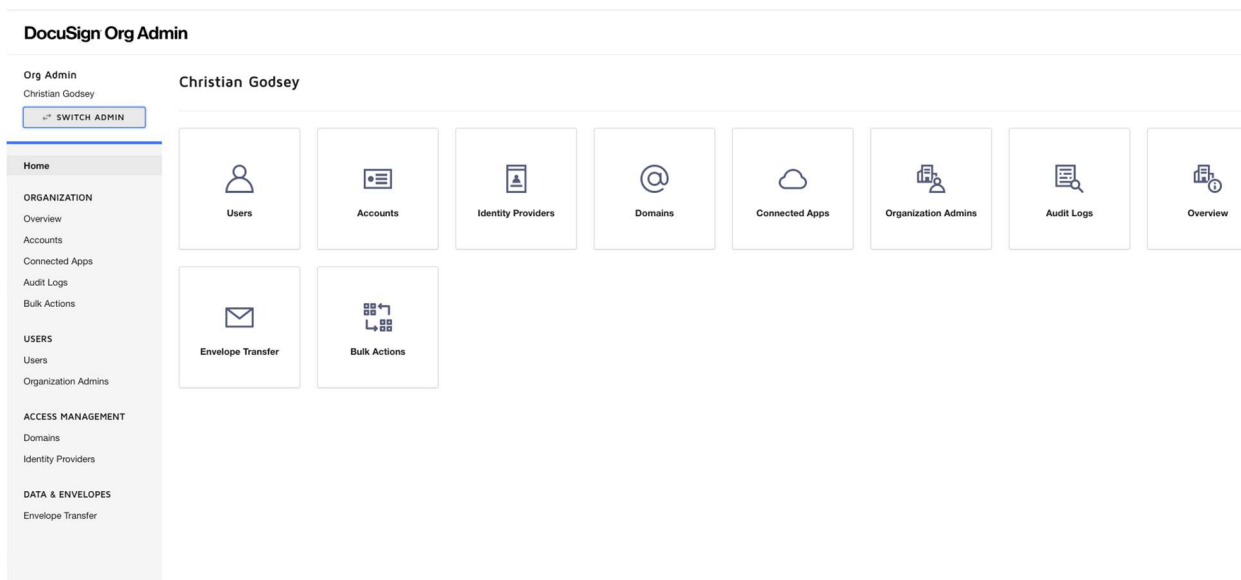
- **Control company use through domain management:** Utilize user list exports, change domain settings, and enforce authentication policies like SSO to manage how your employees interact with DocuSign.
- **Identify account types:** Take advantage of Bulk Actions to see how employees currently use DocuSign. See who may have an external membership, an account outside your control, with Bulk Action User List Exports.
- **Define corporate policies:** Determine what to do with Business Accounts, Personal Accounts, as well as Closed and Pending Accounts.
- **Implement changes:** Manage external memberships by bringing or inviting an account into your organisation, gaining access to or transfer envelopes, or close unneeded accounts. Organization Admin provides a closure deadline to notify users beforehand so they can address any managerial tasks before the closure.
- **Validate your implementation:** Ensure users and accounts comply with company policy via the Bulk Action user List Export and domain settings.

To separate key organisation users and uphold privacy, DocuSign deployments provide for Parent Account/Child Account hierarchy. DocuSign also delivers unique industry capabilities to manage enterprise deployments at an organisational level with full visibility and control over user permissions at both an organisational and sub-account level. Users can be assigned to multiple accounts, and administrators have a global view and control over the permissions, groups, and documents to which users have access. Additionally, the delegated role in Organization Admin called "Accounts" lets you separate user and account management at the organisational level. An organisation admin with the "Accounts" permissions can export account settings as well as link and unlink accounts to the organisation. Note that such admins cannot perform user-management tasks or other organisational capabilities.

DocuSign is a leader in the market for this type of organisational administration. Our most recent organisational administration enables the following actions:

- Streamline and simplify the process of managing users and permissions across your organisation.
- View all your accounts from a centralised location.
- Bulk update domain user email addresses using bulk actions.
- Keep your organization's information secure with domain-level user administration.
- Set up self-service for and manage your organisation for identity management.
- Identify which corporate users have external accounts.
- Define the default account for your domain users to route envelope traffic as needed.
- Administer just-in-time provisioning configurations.
- Manage your organisation's administrative team.
- Quickly update users across all accounts in the organisation via .CSV file using bulk actions, including adding and closing users

The images below illustrate the user interface for Organisation Admin. Organisation administrators can also automatically activate user memberships, eliminating the need for users to activate their accounts via email. This capability is applicable for domain users on accounts linked to the organisation and especially important for scenarios involving embedded workflow or when the signer must have an active account membership.



Organisation Admin helps you manage processes that enable you to gain control of your company's documents. By leveraging domain-level controls and advanced account management capabilities, you will be able to quickly and easily manage your company's agreements.

7.0 Digital Signatures for Enhanced Agreement Security

An electronic signature is a secure, binding electronic symbol that's attached to a document when you sign it. A Docusign eSignature is typically a standard electronic signature.

For most use cases, customers, and places, a standard electronic signature is sufficient. However, transactions in heavily regulated industries, in certain countries or with governmental entities may require or prefer digital signatures. Digital signatures offer a heightened level of identity assurance for electronic signatures.

A digital signature is an electronic signature using cryptographic techniques such as digital certificates to serve the following purposes:

- **Authentication:** Confirm the identity of the signer. A signer's digital certificate creates the signature and ensures that signed documents have not been tampered with.
- **Integrity:** Provide assurance that the content of the document has not been altered.
- **Non-repudiation:** Prevent the signer from denying their involvement or the validity of the signature.

There are international standards that specify requirements for digital signatures, such as the methods used to authenticate a signer. Docusign digital certificate-based signatures (digital signatures) support your efforts to comply with these specifications. Such specifications include the European Union's (EU) Electronic Identification, Authentication and Trust Services regulation (eIDAS). This regulation defines two types of certificate-based signatures called Advanced and Qualified electronic signatures (or AES and QES). Both signatures require identity authentication to issue a digital certificate.

Advanced electronic signatures (AES) add ID verification to the electronic signature signing process. Signatures must be uniquely linked to, and able to identify, the signer. Signature records can show evidence of tampering.

Qualified electronic signatures (QES) have more stringent requirements mandating face-to-face, or equivalent, identity verification (the face-to-face identification can be live and in-person or via an audio/video connection.) A QES is unique in that it's considered legally equivalent to a handwritten signature under eIDAS.

8.0 Identity Verification Services

8.1 DocuSign Identify

Identify is an open platform to connect any identification method to agreements. ID Verification is a DocuSign offering on Identify that automates the verification of a signer's government ID or European eID.

ID Verification: DocuSign ID Verification is the first DocuSign offering on the Identify platform that automates the verification of a signer's government ID, such as a passport, driver's license, and even popular European electronic ID (European eID) methodologies like BankID and IDIN. For transactions that are particularly identity-sensitive, the benefit is lower transaction risks and greater enforceability based on regional requirements. DocuSign ID Verification allows organizations to:

- Verify signers' identity quickly and easily.
- Minimise risk for agreements globally.
- Support Know Your Customer requirements.

How it Works: Identify analyses the security features, watermarks, machine-readable zone of the ID, and name that matches the ID against the envelope. No external database checking is required.

Common Use Cases

- Housing: Tenancy agreements and ID Verification which helps speed up the access housing.
- Administrative: Citizen forms for government bodies such as Birth and Marriage Certificates can now be completed online with ID Verification checks included to help speed up the process and reduce backlogs.
- Financial Services: Account onboarding, Lease and financing, Loans, Wire Transfers
- Insurance: Insurance subscriptions
- HR: Policy eDelivery, onboarding documents
- Legal/Lawyers: Customer enrollment, NDA, Board meeting minutes
- Pharma: Patient forms, Clinical trial onboarding, GxP agreements
- Services: Statement of work, acceptance letters

8.2 ID Evidence

A feature in ID Verification that allows customers to capture ID document information—such as an address, ID number, and/ or date of birth—and retain an image of the ID to support compliance requirements. This has been a top customer request for customers in regulated industries, such as FinServ and Insurance.

Admin Capabilities for DocuSign ID Verification: Admins with DocuSign Identify enabled can create and manage Identity Verification configurations. Senders can then use these configurations to verify the identity of recipients. For each configuration, admins can restrict the list of countries that IDs will be accepted from and set the number of retry attempts before the envelope is locked. For accounts with ID Verification and EU Advanced Signature, admins can also change the signature type applied in the recipient flow. Admins can copy their unique ID verification code. Note: This capability is for API users.

With ID Verification, admins can also:

- Restrict accepted ID methods per country. Examples of ID methods include Passport, Photo ID, eID, or Smart card.
- Restrict recipients from uploading a picture of the ID from their desktop and instead require users to use the mobile experience.
- Allow recipients to skip ID Verification if recipients have already completed their role in the signing order for the document.
- Store optional data extracted from a user's ID, passport, or eID after ID verification; this data is attached to the envelope and will be deleted if the envelope is purged.
- Maintain the default configuration where no additional personal information is stored after identity verification.
- Store ID Evidence data on the same site as the DocuSign account; for example, data for European accounts is stored in Europe.
- Enable only senders to access the ID Evidence data of their envelopes.

In the case particularly of QES processes, DocuSign offers several solutions based on the customer requirements including remote identity verification via video chat, in-person with the delegation of face-to-face identification, as well as the support of signer-held certificates (USB tokens, smartcards, and national IDs on smartcards). DocuSign can also leverage its partners' offerings to complement the existing portfolio.



8.4 Admin Capabilities for DocuSign ID Verification

Admins with DocuSign Identify enabled can create and manage Identity Verification configurations. Senders can then

use these configurations to verify the identity of recipients. For each configuration, admins can restrict the list of countries that IDs will be accepted from and set the number of retry attempts before the envelope is locked.

For accounts with ID Verification and EU Advanced Signature, admins can also change the signature type applied in the recipient flow.

Note: This offer is available for Standard Plans and above. This offer also requires the DocuSign Identify Add-On and Account Plan Item.

9. Docusign IAM

Intelligent agreement management (IAM) is AI-powered cloud software that helps organizations streamline and automate agreement processes while unlocking the power of valuable data trapped in traditional files.

IAM features a suite of applications built for the specific needs of various individuals, teams, lines of business and industries.

IAM for CX simplifies and automates the agreement process for product managers and enhances the agreement process experience for their end customers.

IAM Core is a general offer for customers who want to design their own package that comes in three plan levels: Standard, Professional, and Enterprise.

Agreements are the cornerstone of any successful business. They lay the foundation for relationships with customers, vendors, and employees alike. However, managing agreements can be difficult.

DocuSign Intelligent Agreement Management (IAM) helps organisations manage agreements, making them not only smarter but also more accessible and efficient than ever before. Gone are the days of static documents—now, they're dynamic, data-rich assets that drive value across your org. DocuSign's new capabilities seamlessly connect configurable components of the agreement process and leverage state-of-the-art AI to speed up contract creation, enhance negotiations, and provide strategic insights to manage your agreement portfolio. With DocuSign IAM, organisations can

Accelerate the speed of business revenue.

Empower customers, partners, and employees to agree instantly, anywhere, on any device with our secure and fast signing solutions. Develop and automate customized agreement workflows across your essential business systems to automate processes, close deals, and get to “yes” faster.

Reduce risk.

Reduce manual errors and improve data integrity with automated verification of data to reduce not-in-good-order agreements, along with seamless two-way data syncing between DocuSign and partner applications.

Unlock agreement value.

Harness the power of AI to transform unstructured agreement data into actionable insights to uncover hidden opportunities within your agreements.

Serve your customers and users better.

No-code workflows allow you to easily adapt agreement processes to business needs or regulatory changes, ensuring you consistently deliver trusted, compliant services that elevate customer and user satisfaction and loyalty.

9.1 Docusign IAM applications feature new platform services

Docusign Navigator

Centrally store, manage, and analyze agreements from any source in a smart repository. Navigator is powered by Docusign AI to effectively transform unstructured agreements into structured data.

Easily find agreements, access vital information quickly, and gain valuable insights from your agreements. With Navigator, organizations can drive efficiencies, uncover opportunities to reduce costs, and increase agreement oversight and security.

Docusign App Center

Customize and extend your agreement processes by connecting the tools of your trade within Docusign to make everything faster, easier and more automated. Discover, install, and connect a wide variety of apps like HubSpot and Salesforce to record customer information, ServiceNow to trigger a new workflow, Quik! to extract agreement data, Stripe to generate a payment subscription, or a range of different archival tools (Box, Dropbox, Google Drive, Microsoft OneDrive or SharePoint, and Prisd.io).

Docusign Maestro

Create flexible, customizable agreement workflows that are fine-tuned to your organization's needs without writing a single line of code. Docusign Maestro empowers non-developers to configure custom workflows in minutes—combining Docusign capabilities like eSignature, ID verification, and data verification with third-party apps to connect to your business processes.

9.2 IAM vs eSignature Comparison

- Docusign eSignature: Primarily streamlines the process of electronically signing documents, accelerating business by simplifying how people sign.
- Docusign IAM: Transforms agreement processes by enabling organizations to build and deploy customized, code-free workflows. It addresses the "Agreement Trap" by organizing isolated data and disconnected systems, extending the simplicity of eSignature from agreement creation and negotiation to finalization and data organization.

Maestro Workflows:

- IAM Plans: Maestro is a core platform service within the IAM portfolio, enabling teams to build, view, and edit custom end-to-end agreement workflows without writing code. This standardizes steps, ensures secure information flow, and automates manual activities that cause errors and delays.

Navigator Agreement Management & AI:

- IAM Plans: Navigator, powered by Docusign Iris AI, is a smart repository for storing, managing, and analyzing

agreements. It converts unstructured agreements into structured data, enabling searches for terms, access to information, and insights. Features include bulk upload, renewal management, eSignature sync, and AI-powered data extractions.

eSignature Envelopes/Sends:

- IAM plans include unlimited eSign Web App Sends and "Automation Sends" (100 Sends/User/Year) for Web Forms, Bulk Send, PowerForms, Custom API Sends, and Partner Integration Sends. For IAM Enterprise, Sales, and CX, Partner Integration Sends do not count against Automation Sends.
- eSignature Plans: Standard, Business Pro, and Enterprise Pro eSignature plans typically include a limit of 100 eSignature envelopes per user per year via the web app, with Automation Sends counting towards this limit. Additional transactions incur fees.

Included eSign Edition

- IAM Plans: Corresponding eSignature Plan is included
- eSignature Plans: Are distinct editions themselves (Standard, Business Pro, Enterprise Pro)

CRM Integrations

- IAM Applications: IAM for Sales, IAM for CX include CRM Integrations (like Salesforce, Dynamics) and other specialised features without additional fees.
- eSignature Plans: For eSignature Standard, Professional, and Enterprise plans, Business Process Integrations come with an additional fee.

Pricing Model

- IAM Plans: Represent a shift from an envelope-based pricing model to a license-based pricing model, priced per user per year. This reflects their broader scope and comprehensive solution.
- eSignature Plans: Traditionally use an envelope-based pricing model.

10. DocuSign CLM

The DocuSign Agreement Cloud broadens our solution beyond eSignature to the rest of the agreement process - from preparing to signing, acting on, and managing agreements. DocuSign CLM enhances our end-to-end workflow and cements our Agreement Cloud.

Illustrated below are common problems customers face before implementing DocuSign CLM.

Typical CLM Challenges



Typical Outcomes



DocuSign CLM brings four (4) main product capabilities to the agreement cloud for pre- and post-agreement.

Pre-Agreement

1) Before the signature, DocuSign CLM has capabilities for automated document generation. This allows organisations to create an agreement from a library of approved templates and legal clauses, then connect it to other systems like Salesforce.com to automatically fill in fields with customer and product information. Compared to creating agreements from scratch, automated documentation generation saves time and prevents errors.

2) Additionally, to support collaboration and negotiation, DocuSign CLM enables document redlining, versioning, and activity tracking for every change made to an agreement.

Post-Agreement

3) After the signature, DocuSign CLM provides a central repository for agreements that make them searchable, even when the documents are only images of text (e.g. PDFs). DocuSign CLM has capabilities for adding tags and other metadata to enhance the searching experience. The DocuSign platform has always been able to store signed documentation, but DocuSign CLM streamlines and organises stored agreements.

4) DocuSign CLM offers a comprehensive end-to-end agreement workflow. This allows organisations to automatically move an agreement through a series of activities before, during, and after signing. These activities can be within DocuSign CLM and external systems like Salesforce.com (including, of course, DocuSign eSignature, which is fully integrated). Using DocuSign eSignature and CLM together, a public sector agency can generate, electronically sign, and manage tens of thousands of agreements with restaurants. We are confident that for every existing joint customer like these, there are many more DocuSign customers and prospects that can achieve similar benefits from the eSignature + CLM collaboration.

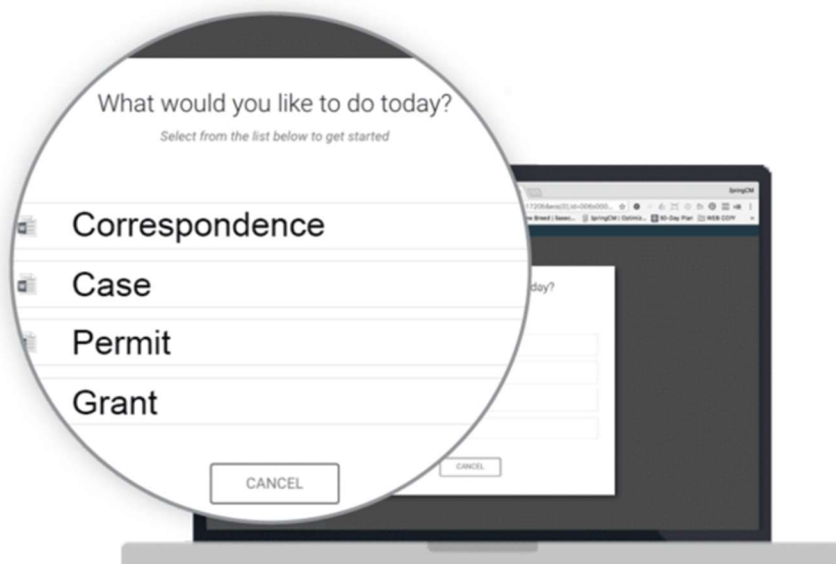
10.1 Public Sector Use Cases for CLM Case Management for the Public Sector

There's a better way government agencies can keep their case workers, constituents, service providers, and other stakeholders on track and closely connected - by using DocuSign CLM Document Management solutions embedded directly in the Salesforce Service Cloud. Centralised, secure, and mobile, DocuSign CLM provides a modern and complete view of case documents inside a Salesforce case record that easily connects agencies to constituents. Agencies can now streamline the generation, workflow, management, and storage of case-related documents on a FedRAMP authorised platform that is tightly integrated with Salesforce and DocuSign resulting in more transparent processes and faster time to resolution.

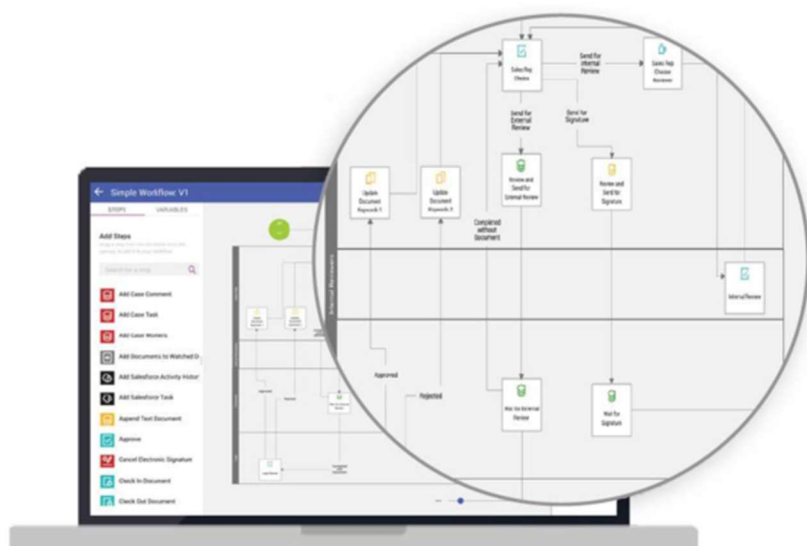
- Case Management
- Compliance
- Correspondence Management
- Freedom of Information Act (FOIA)
- Grants Management
- Inspection Management
- Loan Processing
- Legal/Procurement Contracts
- HR/Onboarding
- Permits
- RFI/RFP Responses
- Vendor Management

10.2 Improve Outcome & Performance

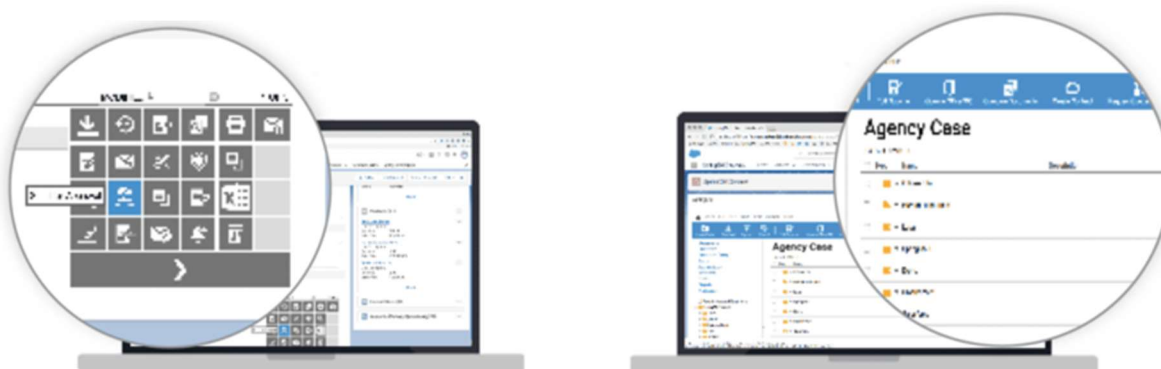
Transform the way the agency manages documents with DocuSign CLM Document Management solutions embedded in the Salesforce Service Cloud. Automate every step in the process - from case intake and preparation to decision tracking - reducing case resolution time from weeks to days. Collaborate with key stakeholders by securely sending documents while maintaining visibility at every step of the process. Speed up casework with intelligent document workflows, automated routing and approvals, digital signatures, and automatic file organisation. Locate documents with enterprise search functionality and enhanced with Optical Character Recognition (OCR).



Document Generation: Seamlessly generate documents using pre-approved templates, pulling data from Salesforce.



Document Workflows: Easily and intuitively drag and drop to build process workflows.



Document Management: Take actions with documents, including:

- Share
- Version
- Redline
- Approval
- Send for eSignature.
- Audit trail history.
- Records retention

11.0 Microsoft

Through a long-term strategic partnership with Microsoft, DocuSign has made its industry-leading electronic signature technology and agreement cloud solution functionalities widely available to businesses and consumers within Microsoft applications. Robust apps for Outlook, Word, SharePoint, Dynamics 365 CRM, and Windows are making it easier for organisations of every size, industry, and geography to quickly and securely transact business anytime, anywhere, on any device.

11.1 Microsoft Integrations

11.1.1 Microsoft Word

DocuSign for Word is simple to use and enables individuals or organisations of any size to securely send and sign important documents right from Word. DocuSign for Word relies on DocuSign, a subscription-based service, and is supported for all versions of word. The app is designed to work with DocuSign Individual, Professional, Business, or Enterprise subscription plans. Users can sign up for a DocuSign free trial from within the DocuSign for Word app. Increase productivity and transact faster by keeping business digital.

Key Features

- Create and edit a document, sign, or send for signature: Sign or request signatures on any document created or edited in Word. Drag and drop tags where recipients need to sign or securely sign a document yourself.
- Streamline business processes: Easily edit a document using Microsoft Word and use DocuSign to specify the signing process to route the document to the right people in the right order.
- Utilise existing credentials: Log in with your existing Microsoft account or Office 365 credentials and use DocuSign without ever leaving Word. No new set up is required.
- Access on the go anytime, anywhere: You and your customers can get your documents signed from any device without downloading another app.
- Secure storage built-in: Once all recipients have signed, automatically save completed documents in a DocuSign documents folder in OneDrive or OneDrive for Business for easy access.

11.1.2 Outlook

DocuSign for Outlook lets you sign and return any document from Outlook within seconds. DocuSign works seamlessly within Outlook allowing you to collect signatures and other information on documents.

Key Features

- Manage email attachments more efficiently: Eliminate the need to print, scan, fax, or send documents overnight by securely signing and returning documents without ever leaving your Outlook inbox. If you need others to sign the document, specify the recipients, and tag the document using DocuSign directly from the app.
- Access DocuSign from your inbox: Access DocuSign from the Outlook apps toolbar by logging into your existing DocuSign account or create a new one using your existing Office 365 credentials. Your accounts are automatically synced using single sign-on capabilities powered by Azure Active Directory.
- Easily send documents for signing from Outlook: Start the signing process from the new mail/reply window, just like you're writing a new email. Simply upload your documents and DocuSign for Outlook prepopulated signers from your email message.
- Benefit from built-in document storage: Connect your DocuSign account with your Office 365 credentials and automatically save copies of completed documents to OneDrive for Business for easy, centralised access.
- Gain administrative controls and management: Administrators can easily manage DocuSign for Outlook for any organisation. Grant access, easily add and remove users, and manage and configure permissions and controls. Ensure compliance and maintain a centralised, secure location for all signed documents throughout your organisation.

11.1.3 SharePoint

DocuSign for SharePoint enables organisations to legally and securely send, sign, and track important documents stored electronically in SharePoint. Easily access, manage, and control documents from a central location so that

you can enhance productivity, transact faster, manage compliance, and keep your business moving.

Key Features

- Easily send and sign documents: Sign and send documents for electronic signature using DocuSign for SharePoint Online. Documents in the SharePoint Online library can be easily sent, signed, and managed by selecting the DocuSign tab in the ribbon bar.
- Automate existing business processes: Automate existing business processes and workflows. Easily select documents in the SharePoint library for signing or sending and use DocuSign to specify a signing workflow to route your document to the right people in the order you choose.
- Track document statuses: Leverage your existing company credentials to sign into DocuSign without leaving SharePoint or create a new DocuSign account using your Office 365 credentials. Accounts are automatically linked using single sign-on capabilities powered by Azure Active Directory.
- Gain Administrative controls and management: Simply manage administrative controls with DocuSign for SharePoint Online. Grant access, managing users, ensure compliance, and maintain a centralised and secure location for all signed documents across your organisation.

11.1.4 Dynamics 365

DocuSign for Dynamics 365 CRM helps Microsoft Dynamics 365 CRM customers send contracts for signature directly from the application. Your customers can sign documents from any browser, including mobile devices, within minutes, and update Dynamics 365 CRM data at the same time. Delight your customers and close deals faster.

Key Features

- Get signatures or sign documents with ease: Signing or getting signatures on a document is simple using DocuSign for Dynamics 365 CRM. The "Sign" and "Get Signatures" actions are preconfigured, allowing you to easily send or sign a document stored in DocuSign for Dynamics 365 CRM, pre-populated with appropriate recipient information.
- Gain more control and visibility into your sales process: DocuSign for Dynamics 365 CRM provides an audit trail of edits and notifies every signer when a document is changed, giving your users visibility into the entire process.
- Empower sales with easy integration: Created with sales departments in mind, DocuSign for Dynamics 365 CRM helps you close business faster. Route contracts to the people you choose, allowing decision-makers to review and approve contracts within minutes. Signed agreements are legally enforceable and backed by a court-admissible audit trail.
- Easily configure and customise: DocuSign for Dynamics 365 CRM is a platform designed and built for flexibility. It can be configured and customise to integrate with most business processes. DocuSign ships a complete set of APIs along with documentation and world-class SDK.

11.1.5 DocuSign for MS Teams

Seamlessly collaborate and keep business moving forward from anywhere with DocuSign eSignature for Microsoft Teams. With this new chatbot, users will receive real-time notifications when a signature is requested, when a document has been signed, and reminders to sign - right from where they are already working. This eliminates the need to switch between apps, boosting productivity and accelerating the completion of agreements.

Key Features

Move Fast: Quickly enter sending workflows (e.g. onboarding documents, sales contracts, etc.) right from Microsoft Teams. Users will also get notifications when they need to sign or when someone completes an agreement, and reminder notifications are automatically sent to encourage others to sign and complete documents. And it works on

virtually any device so users can move fast from wherever they are.

Achieve Peace of Mind: DocuSign meets some of the most stringent US, EU, and global security standards, and uses the strongest data encryption technologies available. And we automatically generate and store a robust audit trail for every agreement.

Get More Value: DocuSign eSignature is everywhere you need it to be within the Microsoft suite of applications with integrations across Office 365 and Dynamics 365. Public Sector can try our DocuSign for Dynamics integrations to send agreements and approvals for eSigning directly from DocuSign for Dynamics CRM 365 or easily prepare and send documents for electronic signature leveraging applications like Microsoft Word, SharePoint, or Outlook

12.Support Services

Three levels of support services are available, one of which must be purchased with the DocuSign offering. Each support package is designed to accelerate deployment, drive adoption, boost workforce performance and realize value faster by leveraging our deep expertise, guidance and support.

The support will be delivered directly by DocuSign.

12.1 Silver Success Pack

This service includes:

Adoption Services

Guidance to deploy with confidence and realise value faster Accelerate your time to value with a mix of on-demand resources and guided assistance from the start. Designed deploy the service quickly and unlock new opportunities, faster.

Onboarding, user 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

Successfully planning activities

With the 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.

Learning Services

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.

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)

Access to self-help channels, included with every DocuSign license agreement, giving access 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	

12.2 Gold Success Pack

Guidance to deploy and adopt with speed and confidence.

Adoption Services

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, user 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

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

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 learning requirements.

Self-paced courses

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

Advisory Services Engagement

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

The DocuSign team offers flexible support tailored to meet 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 is scalable

DocuSign will provide sandbox access, and if something breaks, it will help DocuSign to 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

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	•



Ask AI Assistant

Why is this information important?



12.3 Platinum Success Pack

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.

Adoption Services

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, user 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

Learn

Flexible training options and learning experiences with Campus Pass*.
Learn and practice new skills to turn knowledge into business outcomes.
Maximize the value of your Docusign investment with Learning Services designed to meet all requirements.

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 into 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.

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:

User 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

Scalable Support

DocuSign give you sandbox access, and if something breaks, it will assist in resolution. 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

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

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 dedicated Technical Resource 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	•

13. SCG Corporate

13.1 About SCG Corporate

Today we provide and manage communication solutions to over 1,800 organisations across not for profit, Public Sector, and large corporate clients across the UK. We are part of the Southern Communications Group of Companies (SCG). We have the depth of experience and a track record to best understand and meet your communications requirements. We are listed on several frameworks including CCS Mobile Voice & Data Services RM6261 Lot 2 & Network Services 3 Lot 1a, 2a & 4b, G-Cloud 14 and CPC. We provide solutions to NHS Trusts, Local Councils, Housing Associations, Fire and Rescue Services and many other Public Sector organisations.

We are a company that values your business and believe that we can add value to your business by providing a personal, bespoke, and flexible service.

At SCG Corporate we have a single aim and that is to consistently exceed our customers' expectations. We have a friendly experienced team that works hard to provide you with peace of mind and support you to the highest levels.

13.2 Account Management

SCGC aims to build long-term relationships with customers towards working together for mutual benefit.

Working in partnership with DocuSign and their account management and support team SCGC Clients are allocated two account managers who work together to support the account and back each other up as an escalation point. In addition, a Contract Manager is allocated to the account to manage the Service relationship.

Initially through deployment of the service minimal monthly meetings will be offered with quarterly meetings held once the service has been deployed.

The aim of these reviews being to look at the entire relationship and identify areas that are working well and where there needs to be improvement. It is also a good opportunity for both parties to provide a top-level overview of the market and business developments. Sharing this information often highlights areas where SCGC may be able to assist in more effectively delivering the business strategy and/or providing a solution to a business issue.

A key area that SCGC can add value through providing a combination of contract flexibility across all services at a competitive price throughout the contract and making it simple.

We achieve this through providing regular communication with the customers to learn about their organisation and frustrations and deciding how we can help.

13.3 Support and Escalation

SCG Corporate work in partnership with DocuSign. DocuSign will manage deployment and day-to-day support services. SCG Corporate will also provide details of our support and escalation points should the need require.