



Drive Digital Government Transformation with Docusign and Salesforce

Partner Brief

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Drive Digital Government Transformation with DocuSign and Salesforce

Tired of cumbersome paperwork and delays in public services? Embrace the synergy of streamlined digital workflows and constituent engagement and unlock government digital service delivery with DocuSign and Salesforce. DocuSign extends the value of the Salesforce platform by enabling documents to be generated automatically from data in Salesforce, negotiated, redlined, and routed through complex consent workflows. DocuSign solutions help public sector agencies accelerate turnaround times, reduce risk, eliminate manual processes, and elevate the constituent and employee experience—all without leaving Salesforce.

Prepare documents seamlessly

Create custom, professional documents with just a few clicks with [DocuSign Gen for Salesforce](#). Stop entering information and save time with document templates that dynamically merge data from the relevant custom or standard object

Get documents signed faster

Get agreements signed faster with responsive signing experiences for most devices using your personal identity verification (PIV) or common access card (CAC) credentials. Give constituents a world-class signing experience while increasing process visibility and productivity, and reduce data entry errors by automatically pulling Salesforce data into documents. Signing workflows can be added across the Salesforce platform—including Sales Cloud, Service Cloud, Revenue Cloud, Experience Cloud, and more.

Manage documents from end to end

Streamline the document lifecycle by automating manual tasks, orchestrating complex workflows, and eliminating unnecessary risk with [DocuSign CLM for Salesforce](#). Generate documents with Salesforce data from predefined templates. Reduce risk with centralized review workflows, world-class external redlining and reviewing capabilities. Easily archive and search for agreements within our central agreement repository. Native AI capabilities surface hidden insights within agreements and can speed up the auditing process.

Use case examples

Licensing, permitting, and inspections

- Applications
- Site inspections
- Supporting documentation
- Renewals

Grants management

- Applications
- Grant Agreement
- Financial and programmatic reporting
- Audit

Employee experience

- IQ
- Offer letters
- NDA
- Proof of vaccination
- Vaccination management
- Patient consent
- Immunization records request

Other

- FOIA responses
- Privacy Act waivers

Supercharge productivity

Send and sign documents, use templates, and receive notifications right where teamwork happens, in Slack, without losing productivity with [DocuSign eSignature for Slack](#).

Customize the constituent and employee experience

With our [Apex Toolkit](#), your developers can easily create custom solutions for your eSignature for Salesforce configurations. Find code for the methods to call the DocuSign eSignature API. See examples of how to implement common or important workflows. Use self-paced classes or pre-recorded training materials.

Maintain a secure and compliant environment

Protect and secure data throughout the agreement lifecycle, with FedRAMP, StateRAMP, and DoD IL4 authorized solutions.

Government customers use [DocuSign for Salesforce](#)

Digitizing forms

A national lab invested in Salesforce to manage all customer interactions in its tech transfer office. It added DocuSign for Salesforce to digitize common agreements such as NDAs and licensing agreements. This has given users the ability to execute tech transfer agreements from a single user interface.

Modernizing internal processes

A federal agency was looking to modernize its 22-year-old legacy system for transferring funds to states for joint state/federal programs onto the Salesforce platform. They implemented DocuSign CLM for Salesforce to allow representatives to negotiate, collaborate, redline, and store treasury-state agreements.

Streamlining procurement

A large federal agency streamlined its procurement process and digitized the associated forms on the Salesforce platform. They also implemented DocuSign eSignature for Salesforce to generate documents with pre-populated information from Salesforce, and route for signature using personal identity verification (PIV) cards.

About DocuSign

DocuSign brings agreements to life. Over 1.5 million customers and more than a billion people in over 180 countries use DocuSign solutions to accelerate the process of doing business and simplify people's lives. With intelligent agreement management, DocuSign unleashes business-critical data that is trapped inside of documents. Until now, these were disconnected from business systems of record, costing businesses time, money, and opportunity. Using DocuSign IAM, companies can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).

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