

# Customize, Connect, and Automate Your Agreement Workflows

Whether it's documented or not, your organization has a process for creating and managing agreements. That workflow might be written down somewhere, modeled in a productivity tool, or stored in a spreadsheet tracker on someone's desktop. It might just be perpetuated by muscle memory and repetition. When a team's traditional agreement workflow involves manually transferring data among different document types across multiple systems of record, it results in delays, errors, and lost revenue. A messy agreement process can also create a messy experience for customers, who don't want to get bogged down in redundant paperwork.

**DocuSign Maestro** solves these problems by letting any organization easily build and deploy customized workflows that automate and accelerate their agreement processes without writing any code. It connects all the tools and activities in your workflow so agreement processes are more efficient, more uniform, and have better visibility.

Your team can use Maestro to standardize the steps in your existing agreement workflows and make sure information flows easily and securely. As you grow, Maestro can help you solve new agreement problems by introducing new apps from partners and third-party developers in the **DocuSign App Center**.

## Work smarter and faster

Boost efficiency with custom workflows designed to match your business processes—no code required

## Increase visibility

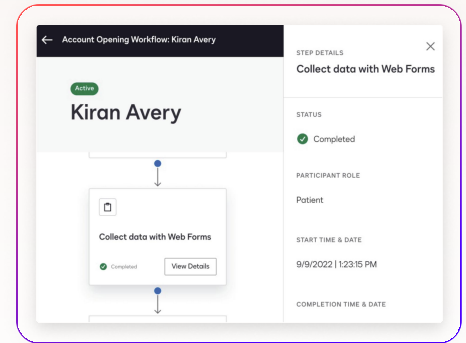
Track and record actions taken at every step of the agreement process

## Reduce costs

Minimize costly standalone integration projects by seamlessly extending workflow capabilities across your tech stack

## Close business faster

Provide a hassle-free customer experience by reducing manual data entry and saving customers valuable time



## Maestro capabilities

### Identity Verification

Build a signer verification step into your agreement workflows

### Web Forms

Capture data and dynamically populate content into agreements for signature

### eSignature

Add electronic signatures to your agreement automation workflows

### App Center

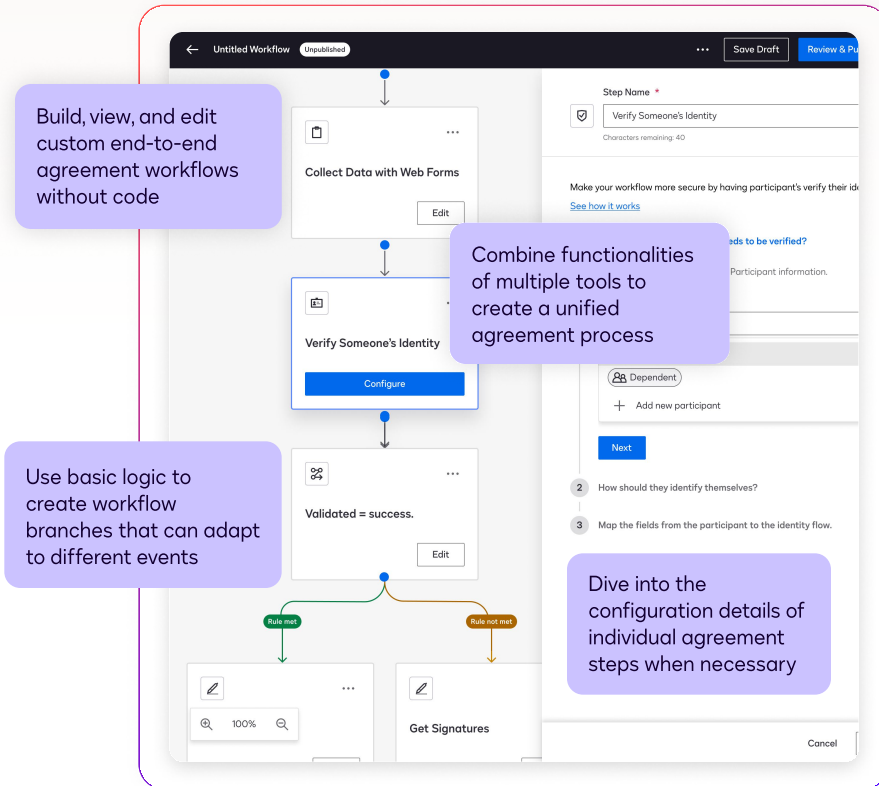
Extend your workflows with partner apps like Google, Microsoft, ServiceNow, and more

### Workflow templates

Get started quickly with out-of-the-box templates for common agreement workflows

### Streamline your agreement process with a simple workflow builder

Maestro lets any team map out the steps in their agreement process in a flexible modular layout. It creates a visual representation of which tools need to be used, the correct order of steps, the criteria required for advancement, and what logic can be applied to branch the flow to adapt to inputs or events. Here's what it looks like:



“Maestro gives us control and autonomy over our processes. We used to need developers to make any changes, but Maestro’s no-code solution allows us to be agile and quickly adapt to changes without relying on technical resources. Maestro helped us streamline our processes, reduce bottlenecks, and speed up customer response times.”

**Systems Integration Lead**  
OnTrack 401(k)

“Maestro will have a huge impact on our business. It allows us to automate the administrative work, so agents can spend more time selling properties and closing deals. This is the future of real estate.”

**Manager**  
Digital Transactions  
Coldwell Banker

Once the steps are arranged in a connected flow, Maestro can even introduce automation to replace common manual activities that cause errors and delays. It’s an easy way for your organization to create simpler, more uniform agreements with much faster business outcomes.

**Maestro** is a core platform service powering the **DocuSign IAM** portfolio.

**Contact us** if you want to learn more about how your team can use intelligent agreement management.

### 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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