

Partner Package for CLM with AI Extension

Quick Start Implementation Package

Accelerate the learning curve and build practical DocuSign CLM workflows that align with your organizational goals.

DocuSign CLM (DocuSign CLM)

- One Automated CLM Workflow with up to two routes for approval, including signature
- Two client templates, including up to 15 merge fields
- Custom CLM folder structure (including creation and environment organization).
- Up to 10 notifications and two reminders
- Three custom reports and one dashboard
- Post-GO-Live Training Sessions (up to three hours)
- Salesforce integration (additional/optional)

AI Extension

- Enable AI Extension for available AI models and store in standard attributes
- Enable bulk AI data review (if applicable, e.g. legacy document migrations)

Team

- 1 Project Manager
- 2 DocuSign Accredited CLM Implementation Consultants

Total Duration: 3-4 Weeks

For pricing information, please reach out to calm@cimplifi.com.