

NEW DOCUSIGN EXPERIENCE

A BETTER WAY TO SIGN AND SEND DOCUMENTS

HOW DO WE GET WEB CUSTOMERS TO USE OUR PRODUCT?

DocuSign trial users were not upgrading to paid plans because they were not able to complete signing/sending a document. We believed the complexity of our product was causing users evaluating our product to not find the value in DocuSign.

ESTABLISHING OUR PERSONAS

We set out to define who are users were by trying to understand what needs they had exactly. We wanted to make sure that we understood how our “learning” customers could grow with us as they uncovered the value of DocuSign through new features and functionality that helped them achieve their goals.

PERSONAS	PAIN POINTS	GOALS	USAGE & TASKS
<p>Learner</p>	<p>Just getting started with DocuSign - perhaps through a trial - has a clear intent and use case</p> <p>Is trying to figure out what DocuSign can do for them</p>	<p>Wastes time and money on sending documents via mail</p>	<p>Discovery</p>
<p>Novice</p>	<p>Has just started using DocuSign and is beginning to embed their workflows in it.</p> <p>Might feel a bit uncomfortable in product early on.</p> <p>May make mistakes and not know how to fix them</p>	<p>Decided for DocuSign, but is initially still insecure about using the product.</p> <p>Am I doing the right thing for my customer?</p> <p>How can I get more of it?</p>	<p>1-2 documents per week</p>
<p>Intermediate</p>	<p>Uses DocuSign regularly in their business transactions.</p> <p>Knows the functionality to get their workflows done.</p> <p>Starts being able to imagine how product can be useful.</p>	<p>Wants to be faster with DocuSign. Potentially use case specific challenges.</p>	<p>3-10 documents per week maybe using templates</p> <p>uses DocuSign to track in-flight documents</p>
<p>Pro</p>	<p>Uses DocuSign multiple times per week.</p> <p>Has covered most of internal use cases with DocuSign</p>	<p>Nuanced feature-level pain points or use-case level pain points.</p>	<p>10+ documents per week likely using templates, branding and other advanced features</p> <p>manages multiple documents</p> <p>manages multiple in-flight documents</p>
<p>Post-Signer (someone who has signed a document and is experiencing the product for the first time.)</p>	<p>Just signed a document on DocuSign and potentially creates a signing account.</p> <p>Really just wants to track their docs.</p> <p>May have a DocuSign use case in the future</p>	<p>Wants to know what happens next</p> <p>Where is my document?</p>	<p>Signing only</p>

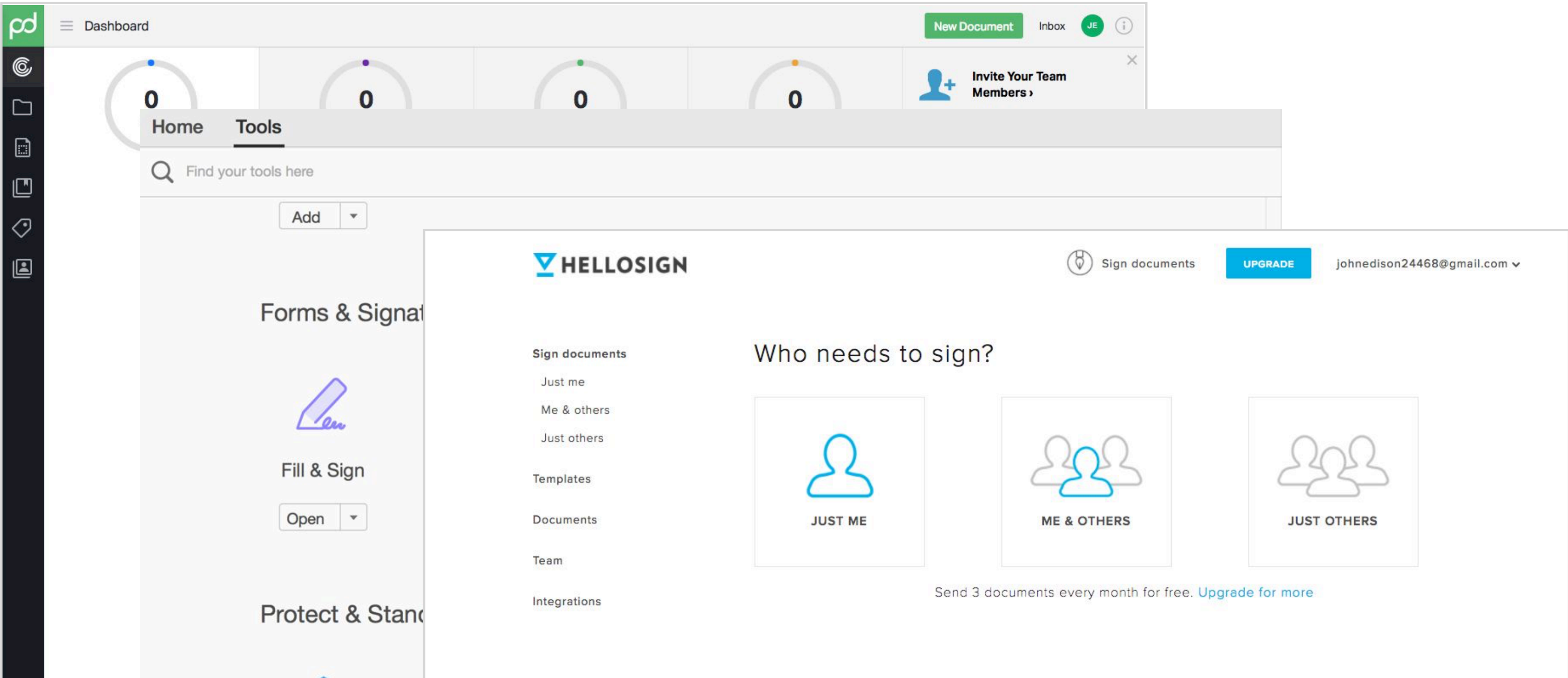
USER PROBLEMS

Establishing our persona as a “learner” or “novice” helped us focus on what types of tasks they were trying to complete, but we still pushed to gather insight into what exactly wasn’t understood. From informational research, user feedback and benchmarking usability testing we found a theme around five core issues.

- 1 I DON'T WANT TO WASTE MY THREE FREE SENDS**
Users hoard their free sends because they immediately get greeted with a gauge telling them they only have 3 – before they've even gotten a chance to see the value of sending.
- 2 I DON'T KNOW WHERE TO START**
Users click around and miss/avoid the “New” buttons because they don't resonate.
- 3 I DON'T KNOW WHETHER I SHOULD SIGN VS. SEND A DOCUMENT**
Users get stuck or choose the wrong option because they might want to sign it and send it.
- 4 I DON'T UNDERSTAND HOW/WHY I SHOULD TAG A DOCUMENT**
Users think their PDF includes spots for signers to fill out already (freeform), so they sometimes send without tagging.
- 5 I DON'T UNDERSTAND THE CONCEPT OF WORKFLOW/SIGNING ORDER**
Users sometimes sign the document themselves, re-import it, then send the document to one person, re-import it, send it to the next person, etc.

SIZING UP THE COMPETITION

We looked into our competition and how they go about it. We also made sure to look over others products to see how they address similar pain points our product was initially suffering from.



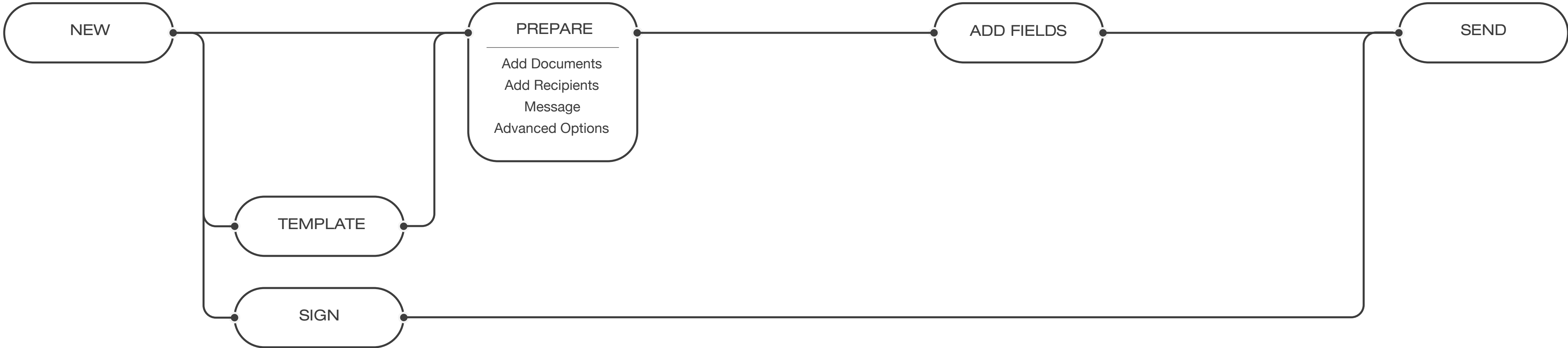
CLEAN UP THE FLOW

Having a single page/step to do 90% of your task is confusing. We unpacked the process of sending a document to make it easier to focus the user and allowed smaller interactions/functionality that was overlooked to be more prominent along the way.

NEW FLOW



OLD FLOW



CLARITY ON THE HOMEPAGE

Upon login we designed a first time experience outlining and setting expectations of what steps were involved in sending. We focused the homepage to help users upload their document more easily, removing any ambiguous steps.

NEW

The new dashboard features a clean, modern design with a blue header. The navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. A user profile for Alex Edwards is shown with a 'DocuSigned by:' signature and ID. A central dashboard area displays three key metrics: '12 Action Required', '2 Waiting for Others', and '-- Expiring Soon'. Below this is a large dashed box for document uploads with a 'START NOW' button. The footer contains promotional cards for upgrading, getting help, and downloading the mobile app, along with a footer with language and copyright information.

OLD

The old dashboard has a more cluttered layout with a blue header and navigation bar. A prominent 'Sign or Get Signatures' button is highlighted in yellow. The main content area is divided into several sections: 'OVERVIEW' with a table of document statuses, 'WHAT'S NEW' with updates on shared template folders and supplemental documents, 'MY DOCUSIGN ID' with user profile information, 'TIPS AND TRICKS' for the mobile app, 'WE WANT YOUR FEEDBACK', and 'HELP AND SUPPORT' links. The footer includes language and copyright information.

OVERVIEW	Last 6 Months
Action Required	4 >
Waiting for Others	10 >
Expiring Soon	3 >
Completed	4 >

HUMANIZING THE LANGUAGE

Important steps like choosing to sign a document yourself or send to others were unclear to users. Simplifying the process and language to be commonly understood allowed users to more confidently complete tasks.

NEW

Proposed lease agreement

Add — Select — Prepare — Review

Select who needs to sign

Me
"I need to sign."

Others
"I need to get signatures from other people."

BACK NEXT

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OLD

TEMPLATES REPORTS

Sign or Get Signatures

NEW

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm

USIGN ID

ist 6 Months

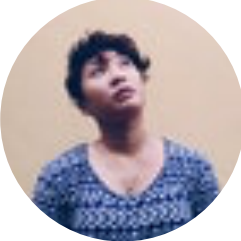
4 >


10 >

WHAT'S NEW

Shared Template Folders
Share collections of templates quickly with individuals and groups by adding a shared template folder. [More Info](#)

Supplemental Documents
A new option for sending information al material,

 **Alex Edward**
alex.edward
Member since

DocuSigned by:


DOUBLE CHECKING THE WORK

Sending out a contract can be stressful! With a new process being taught and multiple steps to complete creating an area to ensure everything is correct gave users a sense of trust and assurance before the final send.

NEW

Review and send

To: All Recipients

Subject: Please DocuSign: Sales_Order.pdf, Presale_NDA.docx

Message: Please DocuSign Sales_Order.pdf
Thank You, Samuel Johnson

PREVIEW BACK SEND

Summary: Envelope Name: Sales_Order.pdf
Documents: Sales_Order.pdf, Presale_NDA.docx
Recipients: Donald Sultan (Needs to Sign, Access code authentication), Sandy Ho (Needs to Sign), James Atwood (Needs to Sign, Private Message)

Once the envelope is completed, all recipients will receive a copy of the signed documents.

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OLD

Upload a Document and Add Recipients

Add Documents to the Envelope

UPLOAD
USE A TEMPLATE
GET FROM CLOUD

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

Set signing order

Alex Edwards | NEEDS TO SIGN MORE

Email or Phone Number

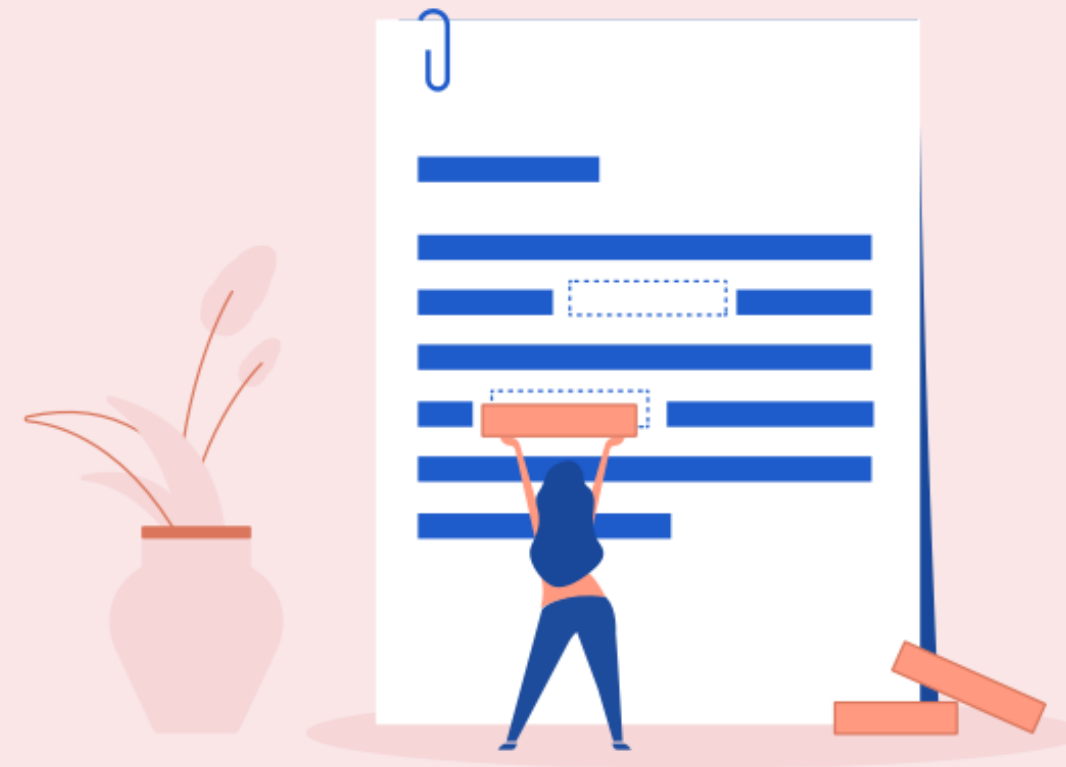
ADD RECIPIENT

Message to All Recipients Advanced Options | Edit

HELPFUL HINTS

After sending a document users got no confirmation or next steps. Providing a friendly confirmation that everything was sent out gives the users a sense of accomplishment. These post sending pages also provide an opportunity to guide users to next steps or discover new functionality.

NEW



Your document was sent.
Need to send it again? Save it as a template.

It's your turn to sign.

SIGN NOW

SAVE AS TEMPLATE

SEQUENCING THE WORK

Rebuilding an entire product can be a daunting task. Working with engineering and product we broke apart the work so we could build, test, learn and adjust as needed. All work was sequenced to incrementally enhance the users experience.

1. Post-sending

2. Focused flow

3. Me & Others

4. Visual Uplift

5. Homepage

6. Remainder



HOW MUCH BETTER IS BETTER?

20%

SEND RATE INCREASE

42%

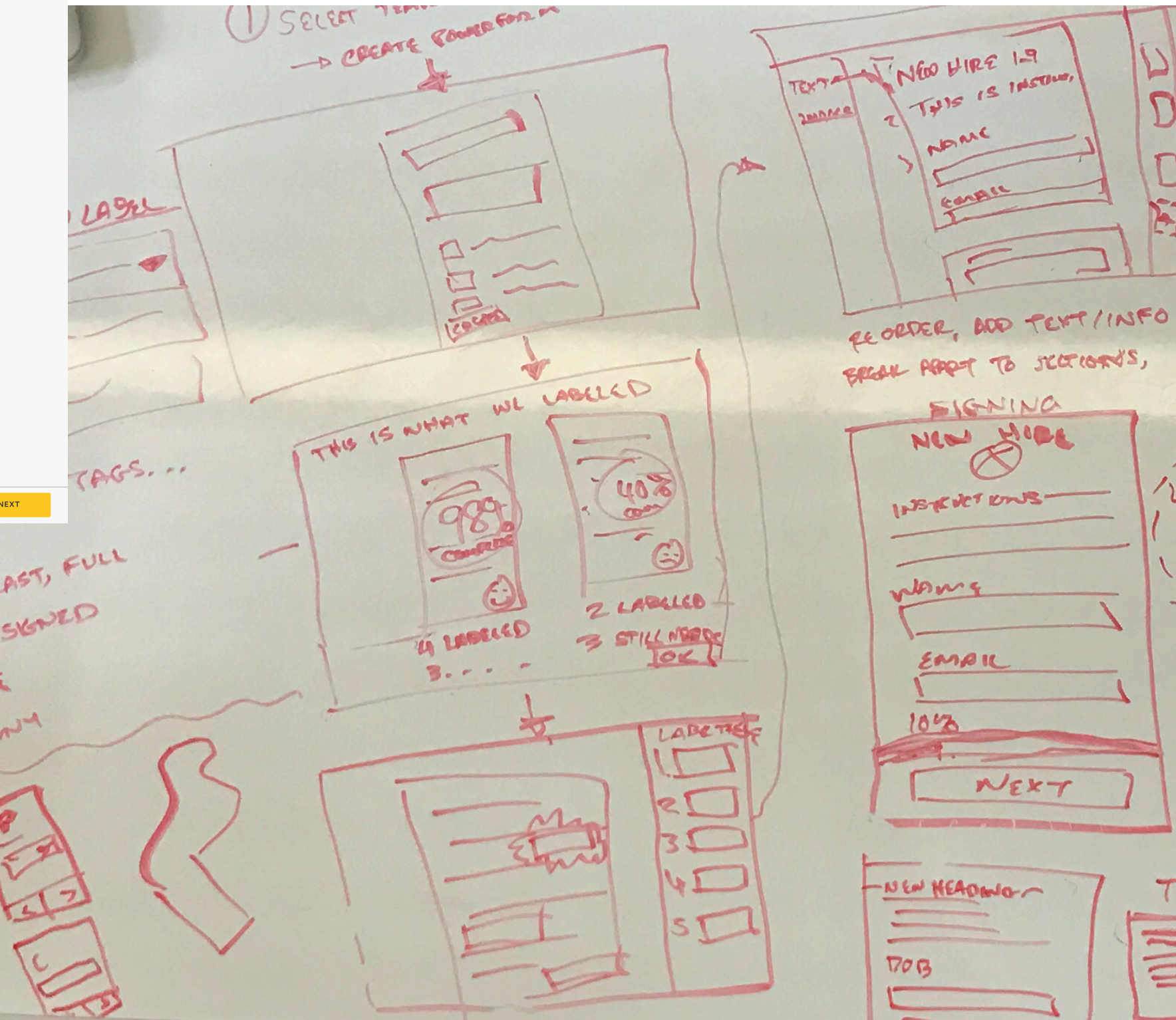
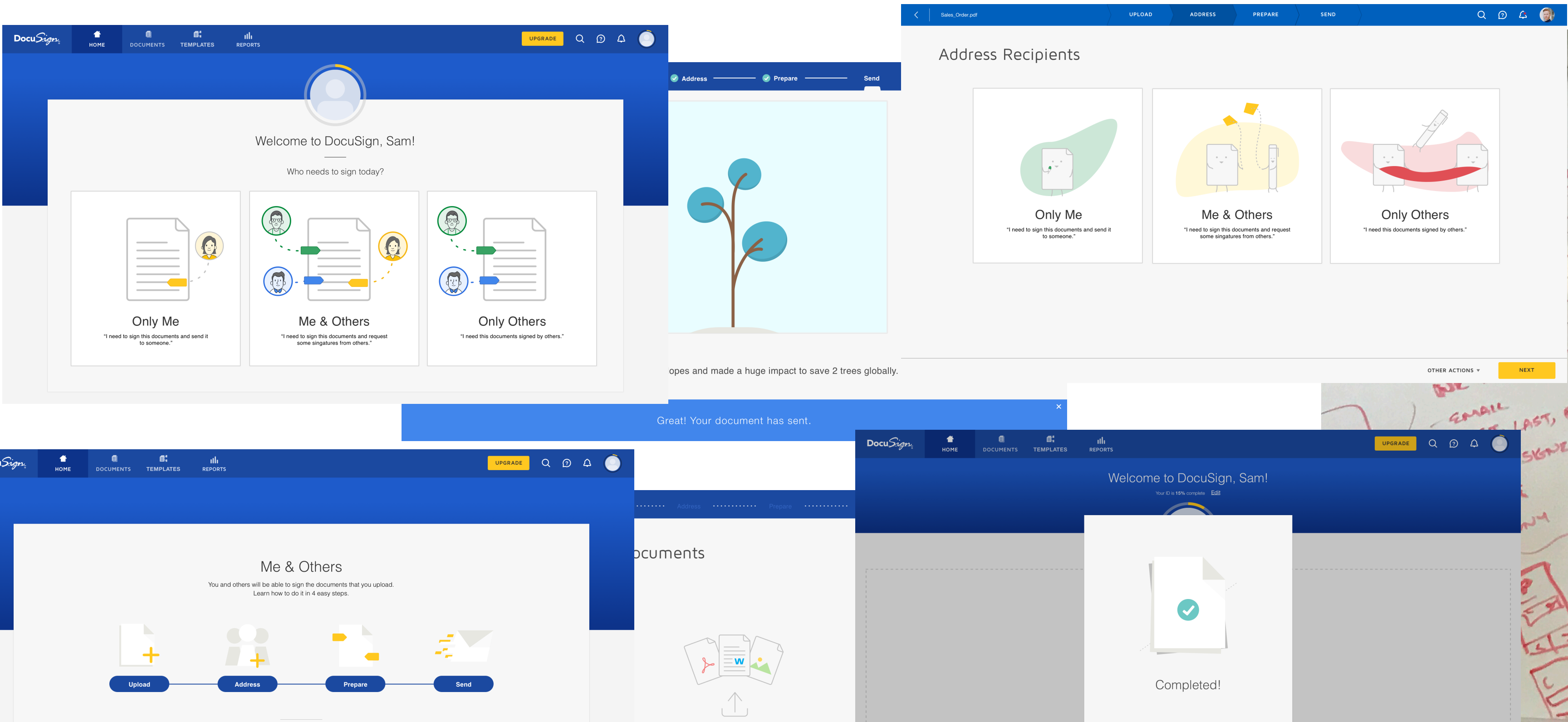
UPGRADE RATE INCREASE

12

POINT NPS SCORE INCREASE

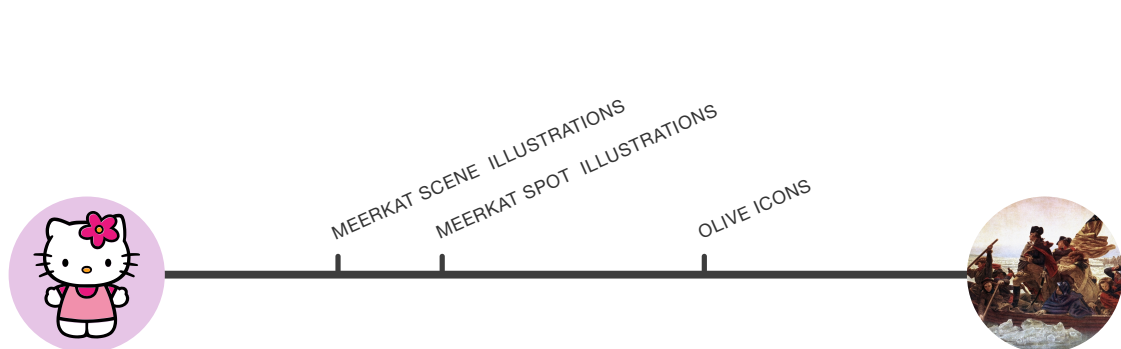
IDEAS ARE CHEAP

Working iteratively and bringing in stakeholders early helped align the team early and brought different perspectives on solving the issues at hand. Working at different levels of fidelity helped quickly review a design or adding polish to show the potential.



SHARING IS CARING

Introducing new visuals and components to our ecosystem time and many iterations, but once established style guides and examples helped ensure styles could be replicated by other designers and used consistently outside this newly created experience.



WHERE WE ARE ON THE SCALE

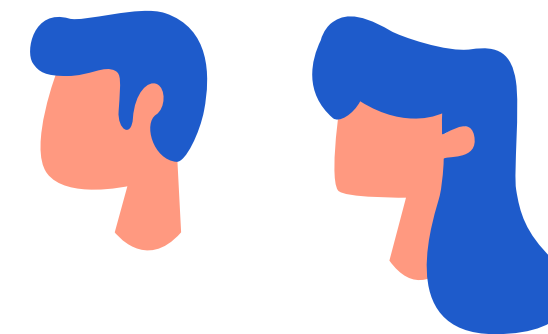
Our illustrations land more in the playful area, using soft simple lines and playful metaphors. Spot illustrations tend to fall into a bit more of a literal metaphor with harder lines and limited elements. Our olive icons are the most literal (due to size constraints) and generally saved for interactive elements so they can communicate a direct action.



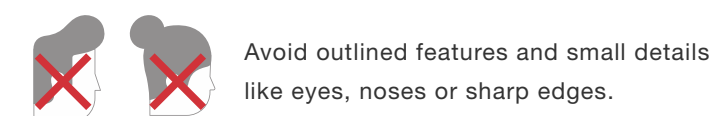
SPOT ILLUSTRATION BREAKDOWN

- ① **Primary object** 2px stroke #777 with rounded caps (~2px corner radius), Generally filled with white. Can have hard shadow to add depth to elements (#d9d9d9 set to multiply).
- ② **Accent item** Uses the olive color pairs. 2px stroke is darker, fill is lighter of the colors.
- ③ **Background element** Light/muted colors with 2px stroke, rounded caps and white fill.
- ④ **Background color** Generally on white background.

CHARACTER FACES



Characters are solid fill colors with softer/round shapes. No details such as eyes or noses, but really it is all about the hair/clothing and pose. Character sizes can change in sizes! Face and hair color can change.



Avoid outlined features and small details like eyes, noses or sharp edges.

CHARACTER HANDS & FEET



Hands are simple in shape and form. You can use "mits" or if you need fingers. Simple shapes work best!



Avoid details such as fingernails and hard finger shapes.

Feet are a general outline. Think general simple shapes. Can be pointed or rounded. Feet usually match the skin color.

