

DocuSign®

“We all came to DocuSign to do the work of our career. Moveworks provides the automation we need to focus on the challenging projects that matter.”

— **Saran Mandair**, Vice President of Global IT, DocuSign

**DocuSign delivers support
with its signature style:
simplicity at scale**

DocuSign → [Case Study](#)

The speed it takes to lead an industry

Headquartered in San Francisco, DocuSign is the Agreement Cloud company that offers the #1 e-signature solution. The company allows organizations to prepare, sign, send, and manage agreements in a fully electronic format—products that have become even more essential to today’s remote workforce. Since its IPO in 2018, DocuSign has continued to grow rapidly, surpassing a \$40 billion market capitalization in mid-2020. More than 500,000 customers and hundreds of millions of users have employed its solutions in over 180 countries.

Given the challenges associated with rapid global expansion, Saran Mandair, DocuSign’s VP of Global IT, saw that legacy IT systems were slowing his team down. Addressing this challenge meant rethinking the support process from top to bottom. And the key, Mandair recognized, was automation: for a company dedicated to ending slow and expensive business processes, speeding up internal support with AI was the logical next step.

“As our business expands, our IT team needs to do more with less, while also enabling a frictionless experience for end-users,” said Mandair. “That’s where Moveworks fits in.”

Automation—without compromise

Working on an IT team means juggling many tasks, from implementing technology on a budget to onboarding new employees at scale. And for the team at DocuSign, these challenges are magnified by the company’s massively increasing employee base and emphasis on a robust security posture.

In the context of a global workforce, Mandair realized that manually handling every support issue was no longer an option. To maintain white-glove support across multiple offices, countries, and time zones, the team began its search for an AI solution to resolve the rising number of support tickets in real-time. This level of automation would allow DocuSign to decouple the size of the IT team from the company’s overall headcount.

“DocuSign’s growth has been tremendous,” added Mandair, “so the challenge became enabling all these new employees in an incredibly short period of time.”

[Hearo ↗](#)
DocuSign’s AI chatbot

Challenges

- Scaling IT support alongside rapid headcount growth and global expansion
- Implementing automation in line with robust security standards

Results

- Moveworks has provided instant IT help to 89% of DocuSign employees
- IT team securely addresses 200+ account issues per month with AI

Key Integrations



Slack
Chat

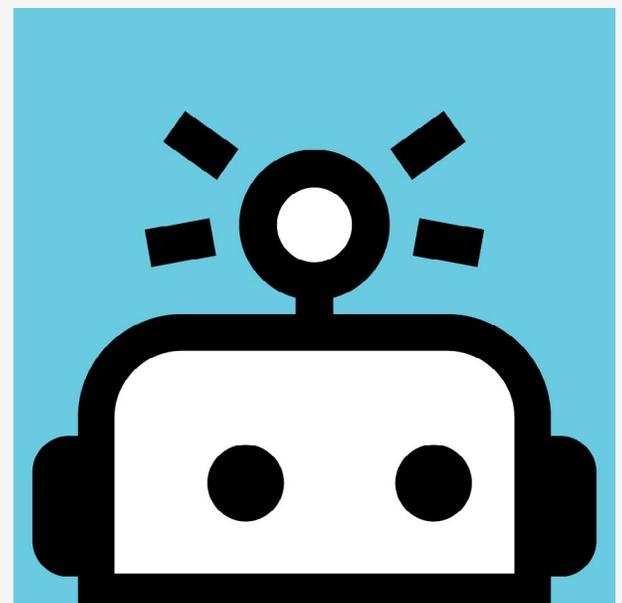


ServiceNow
ITSM



Hitachi ID Bravura Pass
IDAM

Bot



DocuSign meets its Hearo

In February 2020, DocuSign launched its Moveworks chatbot. Known internally as Hearo, the AI-powered chatbot allows the company's employees to self-serve their IT issues straight on Slack—via natural conversation. For DocuSign, Hearo has fundamentally transformed the support process: the bot autonomously resolves 31% of all employee support issues, end-to-end, while routing other issues to the appropriate subject-matter expert.

As Hearo adds more features to its skillset, the chatbot's performance continues to improve. Instead of waiting days to get IT help, employees can get immediate, actionable solutions to many of their tech problems, from provisioning software to unlocking accounts. Across all these automated capabilities, the Moveworks bot is now handling the work of eight full-time service desk agents—completely autonomously.

"People are waiting minutes for IT support with Moveworks, not days or weeks," commented Adonay Mello, Senior IT Manager, End User Automation. "That hidden savings is where I see the biggest value: improving employee productivity."

IT in plain English

When DocuSign began to search for an IT chatbot, they were mostly met with "toolkits": solutions that required extensive building and maintenance to get off the ground. Ultimately, this type of chatbot posed two key problems. For one, DocuSign's IT team simply doesn't have the time to script out thousands of dialog flows—and then edit those dialog flows as its environment inevitably changes. And for employees, this scripted approach to conversations creates a frustrating experience, which leads to low adoption.

With advanced conversational AI, Moveworks is unique in its ability to understand simple, natural language from day one. While conventional chatbots attempt to approximate conversation, Moveworks speaks IT right out of the box, meeting employees on their terms. The result? More than 80% of surveyed employees reported high satisfaction with the bot's support.

"Our goal with Moveworks was to make the entry point for support a natural conversation. So far, the results have been extremely positive. Our employees are now going directly to the bot to get help in real time."

— **Saran Mandair**, VP of Global IT, DocuSign

Moveworks becomes the go-to for support

As a rule, Mandair and his team are very considerate when rolling out new productivity tools. Like many companies, DocuSign is wary of IT sprawl: what happens when too many siloed applications create complications for the service desk and friction for end-users. When implementing another product, the team does so with the explicit purpose of simplifying the IT environment—not just adding to its complexity.



Of support issues resolved autonomously



Service desk agents' work automated by the bot



Instant answers provided by Moveworks per month

Moveworks has played a critical role in solving the problem of IT sprawl by serving as the connective tissue for all the company's software, knowledge, and resources. Because employees can converse with Hearo in natural conversation, the bot has become a go-to for IT issues, making the whole ecosystem more accessible. In fact, while most chatbots struggle to reach 10% adoption, **9 out of 10 DocuSign employees have already used Hearo for instant IT support.**

"You don't need to publicize Moveworks that much to gain adoption," said Mello. "People come back to the bot because they like the experience."

And crucially, Hearo delivers such simple and rapid support that many employees now prefer using the bot instead of asking for help from a service desk agent. Ashish Bhatia, DocuSign's Service Management Lead has noticed a significant increase in employee expectations since implementing the bot.

A partnership predicated on security

DocuSign's business is predicated on allowing users to manage their agreements electronically, with the same confidence as signing a physical document. So, when Mandair and his team were evaluating IT solutions, they kept security top of mind—tools without a high standard for security were immediately crossed off the list.

"Moveworks does more than save time—it's also changed our team's mindset about AI in general. We've started asking if we can transform other business processes in the same way that Moveworks has transformed IT support."

—Adonay Mello,
Senior IT Manager, End User
Automation, DocuSign



"Trust, security, and responsibility are at the core of our business at DocuSign," said Mandair. "We only evaluate vendors who share those same values, and that's what gave us the confidence to partner with Moveworks."

The challenge with many "off-the-shelf" automation tools is their rigidity. What Mandair's team needed was more than mindless automation; they needed a solution that could adjust to complex security protocols within a dynamic organization. Hearo constantly absorbs all the critical information when there are updates and refines its approach to instantly resolve IT issues—without compromising the company's security posture. For example, by taking into account the role, department, and security permissions of a user asking a question, Hearo delivers the most appropriate and relevant response.



Maximizing ROI across the tech stack

While IT teams are continually adding new forms, knowledge articles, and software tools, employees are often unaware of these new resources—leading to underutilized investments. Maximizing these investments is where Moveworks has made its greatest impact. Beyond just improving the employee experience with its conversational interface, Hearo brings the company’s IT resources to life via deep integrations with other enterprise tools.

At DocuSign, the primary way employees access these resources is through forms, which allow the IT team to quickly deliver the best resolution. Moveworks makes these resources readily accessible, and—no matter what employees need—the bot serves up the right form, right away. Every month, Hearo surfaces more than 350 forms, ensuring that much-needed IT solutions are only a message away.

“We’re delighted with Moveworks! The bot delivered all the things we wanted, and we’re looking forward to expanding the bot’s use cases. There’s been a definite return on investment.”

— **Adonay Mello**, Senior IT Manager, End User Automation, DocuSign

 **Email:** Employees are typically verbose when describing their IT issues over email, so your virtual agent must understand complex sentences to decide which emails to automatically address.

 **Forms:** To autonomously take action on an IT form or service catalog, your virtual agent must be able to interpret their distinct structure.

 **Channels:** If your company has an “ask IT” Slack channel, your virtual agent must exercise strong judgement to determine when it can help.

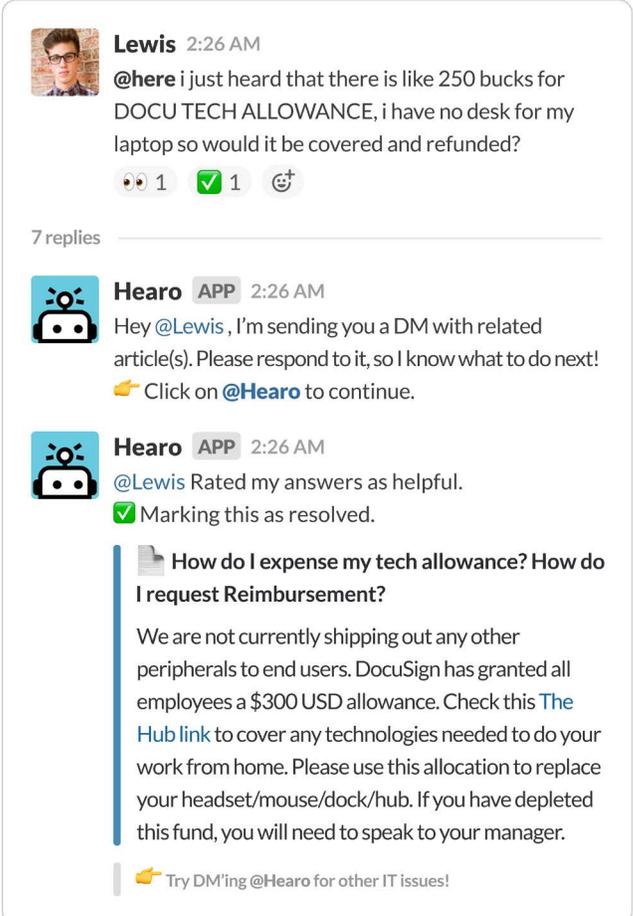
 **System events:** Many IT issues arise without employees reporting them, which is why your virtual agent must monitor and resolve these “system events” before the affected employee files a ticket.

Powering Slack channels with AI

As such a forward-thinking company, DocuSign is on the forefront of the growing movement of addressing IT issues on public Slack channels, crowdsourcing solutions in real time. Particularly now, when many employees share the same SaaS applications and work on the same devices, coworkers can help each other by sharing and resolving their IT issues as a community. But while these channels allow the employees to benefit from the wisdom of the crowd, they tend to be noisy, requiring the support team to monitor a constant stream of messages.

To make sense of this noise, AI has become a necessity. DocuSign has implemented Moveworks’ Channel Resolver in a Slack channel dedicated to onboarding, where Hearo automatically answers questions from new hires. When Moveworks is confident it can solve an issue, it jumps in to help and then shares the answer to the channel for all to see. In this way, the bot is able to preempt future questions about the same issues—saving time for employees and the IT team alike.

“The channel resolver feature is awesome,” noted Mello. “When employees ask a common question, the bot is comfortable answering it immediately. We look forward to exploring this feature more and applying it beyond onboarding.”



Lewis 2:26 AM
@here i just heard that there is like 250 bucks for DOCU TECH ALLOWANCE, i have no desk for my laptop so would it be covered and refunded?
👁️ 1 ✅ 1 🗨️

7 replies

Hearo APP 2:26 AM
Hey **@Lewis**, I'm sending you a DM with related article(s). Please respond to it, so I know what to do next!
👉 Click on **@Hearo** to continue.

Hearo APP 2:26 AM
@Lewis Rated my answers as helpful.
✅ Marking this as resolved.

How do I expense my tech allowance? How do I request Reimbursement?
We are not currently shipping out any other peripherals to end users. DocuSign has granted all employees a \$300 USD allowance. Check this [The Hub link](#) to cover any technologies needed to do your work from home. Please use this allocation to replace your headset/mouse/dock/hub. If you have depleted this fund, you will need to speak to your manager.

👉 Try DM'ing **@Hearo** for other IT issues!

A data-driven approach to IT transformation

From day one, Mandair wanted to go beyond making the company's existing capabilities more accessible. His larger goal was to completely transform DocuSign's IT environment from addressing gaps in its knowledge base to streamlining inefficient workflows. Before implementing AI, individual service desk agents had an anecdotal sense of what was broken, but the team lacked a holistic picture of what was working and what wasn't in its environment.

With Moveworks' Performance Insights Dashboards, the IT team now has visibility over employee support requests in their entirety. This transparency has changed how the team works. As a result, rather than creating knowledge articles based on guesswork, the team is able to prioritize knowledge creation using real-time data. This data-driven approach allows employees to increasingly self-serve a number of IT issues; already, Hearo supplies more than 1,300 answers to troubleshooting questions per month.

"The AI definitely helps us as a team—not only to resolve issues, but to address holes in our knowledge," observed Mello. "We now have the visibility we need to look back at unfilled requests and easily fill in those gaps."

Top articles surfaced by Moveworks



A sign of what's to come

Mello has seen his team "change a lot because of Moveworks." By resolving routine IT issues instantly, the bot frees up agents' time to focus on hard projects—rather than on resetting passwords. In fact, he argues that Hearo's impact has exceeded the bot's functionality itself, since it's showing the entire company what's possible with artificial intelligence.

Given the high-level of employee adoption and satisfaction with Moveworks, Mello explained that the next logical step for DocuSign is to look into new use cases for Hearo. His coworkers have become "so comfortable using the bot for IT" that they've begun to ask Hearo for help in other domains—like HR, sales, and finance—across the enterprise:

"That's what's next."

"Hearo has actually raised the bar for human agents. Our employees now expect faster resolutions than ever before."

—Ashish Bhatia, Service Management Lead, DocuSign

Request a demo

www.moveworks.com/request-demo

