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SUCCESS STORY

Docusign brings the power of generative AI to customers worldwide with Elastic

Docusign uses Elasticsearch and generative AI to streamline the agreement management process, from creating and signing agreements to managing them including tracking auto-renewals that can cost businesses millions.

Region
United States

Industry
Software & Technology

Solution
Elasticsearch

Customers find documents in minutes, not hours

With Elasticsearch, Docusign dramatically reduces the time that customers need to retrieve business-critical documents.

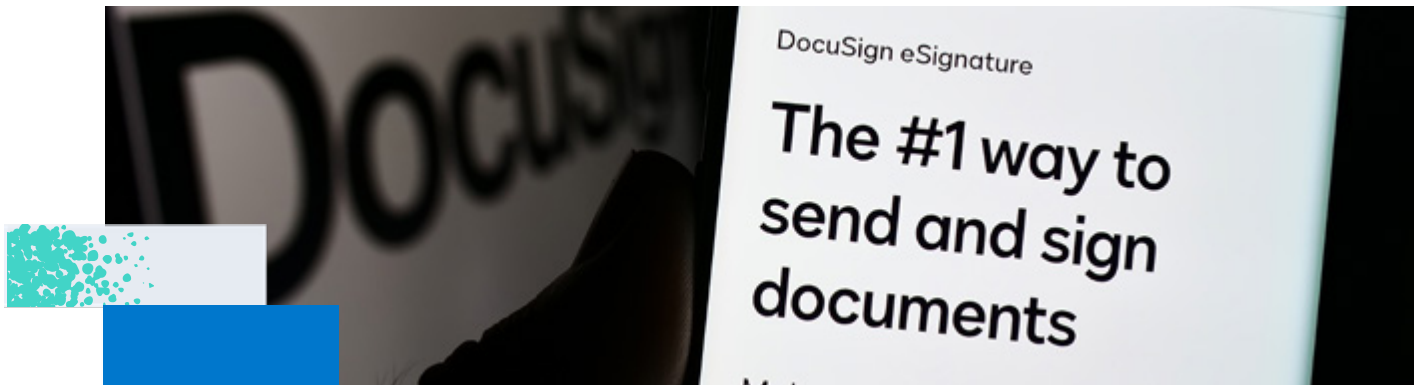**Scalable repository with Elasticsearch**

Customers can add millions of agreements daily safely with the knowledge that Docusign's central repository called Navigator is resilient and scalable with Elasticsearch.

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Elasticsearch is the only solution that can handle billions of new agreements every day while enabling Docusign to deliver the benefits of generative AI to its customers

Docusign is an Intelligent Agreement Management (IAM) company with 1.6 million customers and more than 1 billion users across 180 countries using its services to process millions of agreements daily. The organization is harnessing the power of generative AI to transform how businesses create, manage, and analyze contracts. It chose to place Elasticsearch, built on the Elastic Search AI Platform, at the heart of its Docusign IAM platform.

Hiral Shah, Director of Product, Docusign, explains that before IAM, users often had to search across multiple platforms—such as Google Drive, SharePoint, and even email—to locate agreements. "For example, a procurement professional working with a vendor would need to check with legal to see if an NDA exists, searching through various systems and then reading the entire document to ensure compliance," she says.

Now, IAM can surface key agreement insights so customers can find specific critical information in their agreements powered by Elasticsearch in seconds. Armed with these insights, they can create and renew contracts faster and streamline the entire agreement management process to save money, reduce risk, and grow their business.

Microsoft Azure and Elasticsearch: The best of both worlds

Docusign initially hosted Elasticsearch on its own servers but more recently transitioned to the cloud and now runs Elasticsearch on Microsoft Azure. "This gives us the best of both worlds," says Hiral. "We can deliver powerful AI capabilities from our partnerships with Microsoft Azure AI with Elastic's robust search functionalities."

In Docusign's repository called Navigator powered by Elasticsearch, users can ask a question—such as "Find me all agreements with termination clauses"—in the search bar. Elasticsearch indexes all relevant agreements and highlights the content, providing not just the answer but also the surrounding context.

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> We often get asked, "Why Elasticsearch?" One of the key reasons is the sheer volume of agreements we handle—millions daily. There's no other company in the world that can manage this level of activity, making Elastic an essential partner in our operations.

Hiral Shah
Director of Product
Docusign

Hiral stresses the role of AI throughout the entire agreement lifecycle—from creation and negotiation to execution and analysis. For instance, if a customer needs to draft a lease agreement, AI will generate an initial version for them. During the negotiation phase, Docusign AI-Assisted Review can speed this up with suggested redlines, highlighting the key deviations and suggesting changes.

When it's time to execute, identity verification ensures the signer is who they say they are. Once signed, the agreement is stored in a central repository called Docusign Navigator where all the data is structured. Hiral explains, "Elasticsearch enables us to help customers easily find specific agreements. As renewal deadlines approach, we proactively send notifications to avoid missing important dates."

Savings for over a million of customers worldwide

Customers benefit twofold. First, they save significant time. As Hiral explains, "Imagine a legal team receiving a 9 PM request to find a specific vendor agreement. Traditionally, this could take hours. With Navigator and Elasticsearch, it now takes less than a minute, dramatically improving efficiency."

Second, Navigator can help deliver financial savings. Many overlook the value of active agreement management. Hiral notes, "One of our key features combines AI with Elastic to proactively identify renewal opportunities, saving customers money."

For instance, customers might pay for unused vendor services. Docusign can now identify these situations and send reminders. As Hiral explains, "This proactive approach helps our customers save money by addressing unused services and contracts before costs accumulate."

Elasticsearch also enables Docusign to rapidly add new features to their IAM platform. "Navigator's effectiveness hinges on the ability to find and analyze information within it," says Hiral. Elastic empowers Docusign to enhance search and analysis capabilities, ensuring users consistently benefit from the latest innovations that deliver value and insights.

Serve more with Elastic Cloud Serverless

Hiral praises the Elastic team for supporting Docusign's mission to bring generative AI to customers worldwide. Hiral says, "One of the best aspects of working with the Elastic team is their willingness to listen and adapt. We've pushed them to the limits with our unique requirements, but they consistently come back with innovative ideas and collaborate to achieve our goals."

At one stage during beta testing discussions, Hiral expressed the desire to optimize for cost. The Elastic team responded by suggesting various storage capabilities—such as hot, medium, and cold storage—that deliver greater value and cost efficiency. Additionally, Elastic's new serverless technology will enable Docusign to deliver solutions based on cloud-native architectures to its customers at scale.

Hiral is exploring the integration of semantic search features into the IAM platform. She envisions a Q&A approach that leverages Elasticsearch vector database and RAG solution. This would enable users to ask natural language questions and receive accurate, relevant answers based on the repository data. Hiral believes this approach will enhance user interaction and facilitate data-driven decision-making.

> Generative AI is revolutionizing every part of the agreement process. With Elasticsearch, we're able to turn this disruption into business value and competitive advantage for our customers."

Hiral Shah
Director of Product
Docusign

See how you can utilize Elasticsearch with a free, 14 day trial.

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