

Higher Education Use Cases

Digital adoption playbook

Higher Education priorities

From admissions to financial aid, agreements are everywhere within Higher Education. For many institutions, it's a heavily manual process and differs between departments. As a result, processes to obtain these agreements are needlessly slow, costly, and cumbersome for faculty and students.

We've seen that enrollments can take up to 4x longer when institutions fail to optimize their agreement process. Aside from the potential reduction in turnaround time for agreements, the benefits we've seen also include a reduction in errors—10% error rate to near 0%—after implementing DocuSign.

Streamline manual, tedious processes and transform your system of agreement with the DocuSign Agreement Cloud for Higher Education.

The DocuSign Agreement Cloud

Every Higher Education institution has a system of agreement for preparing, signing, acting on, and managing agreements. In most cases, it is a mess of manual processes and office technologies like printing, scanning, emailing, and faxing – and it's not consistent from department to department.

To modernize and unify their systems of agreement, institutions of higher education are adopting the DocuSign Agreement Cloud™. Most start with DocuSign eSignature, then connect and automate other parts of the agreement process. At each step, the result is the ability to do business faster, simpler, greener, and more cost-efficiently, while delivering a better experience for students, faculty, and staff. We call this being more agreeable: easier to do business with, easier to do business for, and easier on the environment.

Prepare

Prepare agreements with a high degree of automation. For example, you can import your existing forms or prefill with data you already collected. Enable real-time comments and capture them in the completion record.

Sign

Sign documents anytime, anywhere, on any device with automated routing, signer identification, and capture legally enforceable signatures.

Act

Act on agreement terms after signing is complete. Avoid rekeying data by automatically updating other systems and trigger processes like billing activation and payments.

Manage

Manage completed agreements digitally, in a centralized, highly secure environment, with flexible options for retrieval, content and specialized forms of document retention.

Higher Education use cases

There are five classes of Higher Education workflows that are used independently or as a combination e.g. collecting data and signing.



Sign

Binding legal documents that require a legally-defensible signature



Notify

Use cases that are intended to inform or notify employees, suppliers or vendors



Acknowledge

Use cases requiring confirmation that the employee, vendor or supplier has read/agreed/complied



Approve

Use cases that ask for an approval as opposed to a more formal signature



Collect data

Use cases where information needs to be collected from the recipient(s)

Opportunities

Institutions of Higher Education can categorize their use case deployments within one of four quadrants: a higher or lower ROI in combination with an Implementation Speed of Faster (Shorter) or Slower (Longer).

Access the [Use Case Map Tool](#) at bottom of the [DocuSign Knowledge Market](#) homepage for a complete list of all Higher Education use cases.

Your institution is naturally comprised of many internal departments that are essential to students, faculty, and staff.

Use cases can be applied in the following departments:

Medical Center

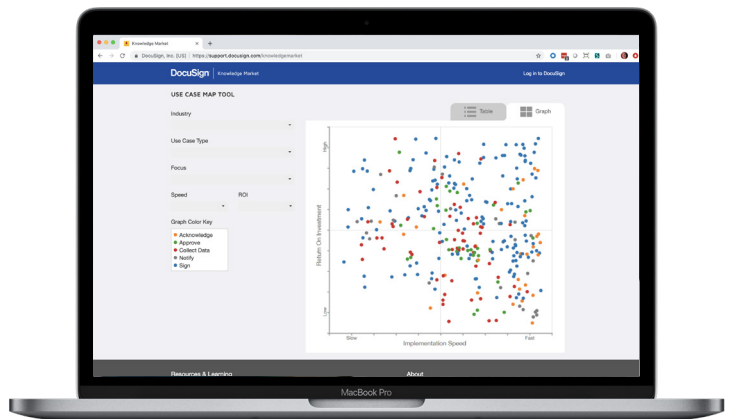
Research/Sponsored Programs

Technology Commercialization

Human Resources

Athletics

For a consolidated list of playbooks, check out our [department playbook library](#).



Use Case Map Tool

Follow a use case through the Agreement process

Follow a Graduate Assistant (GA) Offer Letter through each Agreement Cloud phase and see how our suite of Agreement Cloud products serves a variety of Higher Education use case needs. With a dozen applications and more than 350 integrations, we enable organizations to do business faster with less risk throughout their entire agreement process.

Prepare

Action	Example	
Import documents and data	DocuSign eSignature Create a Graduate Assistant (GA) hiring template for consistent GA hiring across colleges	DocuSign Agreement Cloud Leverage the DocuSign API to build personalized hiring packets based on candidate information and college branding
Enable real-time questions and comments in a chat interface. The interactions are captured as part of the policy completion record.	Live-Chat using DocuSign Comments* with a candidate who has questions about the GA position. The interactions are captured as part of the envelope *Contact your Account Manager to enable Comments on your account.	

Sign

Action	Example	
Route	DocuSign eSignature Send the offer letter to the department head and the candidate. Route the completed envelope to the HR processing team	DocuSign Agreement Cloud Use the DocuSign API to autoroute the offer letter based on the candidate information already stored in your HR system, like Workday
Identify	DocuSign eSignature Apply one of DocuSign Identify's recipient authentication options as a second layer of signer identification prior to the client(s) viewing and signing the GA	DocuSign Agreement Cloud Included in the suite of identification methods, DocuSign ID Verification is a mobile-friendly type of authentication that supports government photo IDs and European eIDs by analyzing the document security features and matching the name on the GA against the name on the ID
Sign	DocuSign eSignature Send the offer letter to the candidate via email to sign on his/her computer or mobile device	DocuSign Agreement Cloud Use the DocuSign mobile app to initiate In-Person Signing on a tablet, allowing both the Advisor and the student to sign anywhere, even while offline

Act

Action	Example	
Update other systems with information from signed agreements Trigger process	DocuSign eSignature "CC" the signed GA offer letter to the hiring manager	DocuSign Agreement Cloud The DocuSign API initiates the creation of a user ID, request computer hardware, and reserve office space in your CRM systems like Workday or Salesforce

Manage

Action	Example	
Retain	DocuSign eSignature The completed GA letter is automatically stored in the DocuSign eSignature Web App	DocuSign Agreement Cloud The completed document is stored in your CRM and/or document storage system like Treeno
Retrieve	DocuSign eSignature Use multiple search criteria to find and extract the account GA and its data from the DocuSign eSignature Web App	DocuSign Agreement Cloud Leverage the power of AI with DocuSign Total Search . Find and retrieve GA docs based on multiple attributes like the assigned Advisor and college
Report	DocuSign eSignature Create, save, and schedule reports on envelope, recipient, and sender data in the DocuSign Web App	DocuSign Agreement Cloud Quickly locate and build detailed reports from metadata on all GA docs using DocuSign Intelligent Insights . Identify GA trends across multiple colleges to analyze hiring success rates and terms of agreement

Top Higher Education use cases

Area	Use case	Type	Imp. speed	ROI	Focus
Admission and aid	Early decision agreement	Acknowledge	Medium	Medium	External
Human resources	New hire paperwork	Collect data	Fast	High	External
Campus life	Campus policy forms	Sign	Fast	High	Internal
Admission and aid	Application fee payment/waiver forms	Notify	Fast	Medium	External
Admission and aid	Admission deferral forms	Approve	Medium	Medium	External

How an International University saved with DocuSign

This particular International University was one of the many institutions striving to break free of legacy systems and increase enrollment capacity. Improving their students' experience was a top priority.

So, as part of its digital innovation strategy, the University worked with DocuSign to streamline agreement processes across admissions, student financial forms, and academics. They moved from manual to digital, automated processes, and integrated core systems to make processing student paperwork quicker and more reliable.

Results

5x faster

Academic forms were completed 5x faster – what before took 10 days to complete, now only takes 2 days

\$4.3M saved

Because they signed over 500K enrollment agreements, they saw a \$4.3M savings after digitizing their admissions process

Improved efficiency

The University improved its efficiency too – their automated process allowed admissions forms to be completed in half the time

Positive feedback

The faculty has also received feedback from students on how easy the admissions process was – some mentioned that it was even fun!

Transform your customer journey

The following is a high-level summary of the recommended Customer Success tools for accelerating the rollout of the DocuSign Agreement Cloud throughout your organization. The opportunities, methodologies, and resources below can be applied to your agreement processes, regardless of your industry or department.

Action	Resources
Launch Rapidly deploy product solution(s) and enable new users globally	Review the Use Case Map Tool on the Knowledge Market homepage for use case ideas and to prioritize top use cases both in your industry and the departments within your organization Access the wide-range of DocuSign University (DSU) Learning Plans to ensure your DocuSign project team is prepared to effectively understand and use our core DocuSign eSignature product Get started for Signers Get started for Senders Get started for Admins
Optimize Optimize solutions and drive adoption with your current user base	To increase adoption across your organization and with your customers, start with the Adoption Toolkit Learn how other companies implemented DocuSign with our Customer Success Stories Check out the Business Strategy catalog for more ways to optimize
Grow Expand solutions to new users, new use cases and new products	Automate each agreement stage by leveraging additional products like DocuSign CLM and DocuSign Intelligent Insights in addition to integrating with your existing insurance CRM tools like Salesforce Review our index of Adoption Tools and best practices to grow user and customer adoption

For more strategic advice on your business needs, please reach out to your account team or contact a FUJIFILM Business Innovation representative below.



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